



Whiteboard Tracker Flow Sheet:

1. Patient Initials

- a. Who: Triage OR Manager will fill out column
- b. What: Three letters, first two letters of last name and first letter of first name; patient initials should also be labeled on chart (ex. John Doe would be DOJ)
- c. When: Either once the sign-up sheet has been completed or as it is being filled out, it is the responsibility of whoever fills out the sign in sheet to copy the initials over to the whiteboard in order
 - i. The number of available sign up spots is at the discretion of the manager
 - ii. If patient is currently enrolled in PAP, see step #6

2. Triage

- a. Who: Triage will fill out column
- b. What: Checkmark, indicating triage is complete
- c. When: After patient has been triaged and chart has been placed in pile for the medical students
 - i. The most recent patient triaged should be at the bottom of that pile, so that patients are seen in the order that they are triaged

3. Student

- a. Who: Medical Student Seeing Patient will fill out column
- b. What: First name of medical student seeing patient
- c. When: Immediately write name once you pick up a patient chart; this patient chart is now your responsibility

4. Seen

- a. Who: Medical Student Seeing Patient will fill out column
- b. What: Checkmark, indicating patient is no longer in patient room
- c. When: Only mark this column as complete once you have done your initial assessment AND the patient has been seen by the attending physician
 - i. This checkmark indicates that the patient is now back in the waiting room

5. Waiting on Meds

- a. Who: Medical Student Seeing Patient will fill out column
 - Write "DISP" if only waiting on meds from dispensary, once chart has been given to dispensary
 - Write "PAP" if only waiting on meds from PAP
 - Write "DISP + PAP" if waiting on meds from dispensary and PAP, once chart has been given to dispensary
 - Write "NO" if no meds need to be dispensed to this patient

6. PAP

- a. Who: PAP, Triage, OR Medical Student Seeing Patient will fill out column
- At the start of clinic, PAP or Triage student will write a checkmark if patient is currently enrolled in PAP
- Medical student will write “NEW” if patient is enrolling in PAP, but they ALSO will notify PAP that they have a new patient

7. Comments

- a. Who: Anyone can fill out column
- b. What: Any extra information that is pertinent to clinic flow such as “Left Early”
 - i. This would be the place to include messages requesting interdisciplinary help such as “Needs OT” or “Needs SMILE” or “Needs Social Work”

8. Meds Given

- a. Who: Dispensary will fill out column
- b. What: Checkmark, indicating completion of patient visit
- c. When: Fill out this column once (1) Attending Physician has signed off on chart, (2) medications & medication education have been given to patient, and (3) chart is back in triage for refiling
 - i. MANAGER is responsible for physically moving the whiteboard from its location near Triage to be near Dispensary by the end of clinic

Example:

| Patient | Triaged | Student | Seen | Waiting on Meds | PAP | Comments | Meds Given |
|---------|---------|---------|------|-----------------|-----|----------|------------|
| DOJ | √ | Dani | √ | DISP | | Needs OT | √ |
| SMJ | √ | Peter | √ | DISP + PAP | √ | | |
| KIE | √ | Dani | | | NEW | | |