

Onboarding Competency Checklist

As of August 2023

Adult Chronic Disease Management

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
New Dx Diabetes					
DM f/u					
HTN					
CHF					
COPD					
Asthma					
CAD					
CVA					
Smoking Cessation					
Anticoagulation					
Chronic Pain Syndrome					
Medicare Visit					
Advanced Directive/MOLST					
Death Certificates					
Emergency/Code					
Dealing with difficult patients					

Cardiopulmonary Skills/Procedures

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
ECG interp.					
Spirometry interp.					

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Holter Monitor interp.					
Chest X-ray Interp.					
Interpreting ABI's					
*Cardiac Sounds					

Women's Health Management

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Birth control counseling					
Oral BC selection					
New pregnancy					
SAB counseling					
TAB counseling					
Dysf. Uterine Bleeding					
Amenorrhea					
PCOS work-up					
Perimenopause treatment					
Post-menopausal bleeding w/u					
Vaginal d/c					
Breast mass					

Women's Health Procedures

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
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Pelvic exam					
Pap smear					
IUD removal					
Wet Mount/KOH					
*IUD insertion					
*Nexplanon Insertion					
*Nexplanon Removal					
*Colposcopy					
*Endometrial Biopsy					

Pediatric Routine Visits

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
WC Newborn					
WC 2 mo					
WC 4 mo					
WC 6 mo					
WC 9-12 mo					
WC 2-4 yo					
WC 5-7 yo					
WC 8-10 yo					
WC 11-13 yo					
WC 14-18 yo					
Asthma mng					
ADHD Rx mng					

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Pediatric Acute Visits

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Acute asthma					
Pharyngitis					
OM					
Bronchiolitis/PNA					
Abdominal pain					
Head Injury/Concussion					
Anaphylaxis					
Child Abuse Reporting					
Open 51A					

Dermatology Procedures

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Shave Biopsy					
Punch Biopsy					
Cryotherapy					
Common Lesions					
Wart treatment					
Suturing					
Skin Tag Removal					
Foreign Body					
*Electrodesiccation and Curettage					
*Elliptical Biopsy					
*Cyst Excision					
*Lipoma Excision					

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Psychiatric / MH

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Depression Rx					
Anxiety RX					
BZD management					
Bipolar Management					
IBH Collaboration					
Approach to Crisis					
Section 12 Process					
Section 35 Process					

Orthopedics/Musculoskeletal

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Shoulder Exam					
Knee Exam					
Hip Exam					
Wrist Exam					
Hand Exam					
*Knee Arthrocentesis					
Knee Injection					
Subacromial bursa Injection					
Trochanteric Bursa Injection					
Splinting					

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X-ray Interpr.					
Trigger Point Injection					
*Carpal Tunnel Injection					
*Dequervain's Injection					
*Dislocation reduction					

Addiction Medicine

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Physiology of Addiction					
Opioid Rx laws					
Outpatient ETOH protocol					
Buprenorphine Training					
Naltrexone PO/IM					
Naloxone Rx					
OBOT visits					
UDS/Cheek Swabs					
Referral for treatment					
MassPat (PMP)					
CSRP orientation					

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Infectious Disease

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
Reportable Dx					
STD testing					
GC/CT treatment					
Reporting Process					
HCV screening/testing					
HIV Dx					
Tick-borne Illness testing					
Tick-Borne Illness Tx					
Lyme Prophylaxis					
*HIV Treatment					
*HCV Treatment					

SYSTEMS

	Date	Self-Assessment	Preceptor Assessment	Method	Re-evaluation
CCM					
Advance care planning					
Smoking Cessation					
Booking your own patient					
EMR training Per Martha					

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