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To: Human Resources Directors
Student Health Center Directors

From:  Cathy Robinson, Assistant Vice Chancellor
Human Resources Administration

RESPONSE REQUIRED BY
Monday, June 7, 2004

Subject: Health Care Support Classification Study

In response to a request from the CSU Health Services Advisory Committee, Human Resources Administration developed draft classification standards for selected new and existing health care support (Unit 2) classifications. This memorandum provides a project overview and draft classification standards, and requests your review and feedback of the proposed drafts. **Your input is critical to the development of the final classification standards and assists us in ensuring that the new standards meet campuses' operational needs.** For your reference, the following attachments are provided:

Attachment A – Classification Summary Description

Attachment B – Draft Classification Standards

Project Overview:

The following classifications are included in this study:

Current Classifications (Unit 2)	New Classifications (Unit 2 – subject to approval by PERB)
Clinical Aid I and II	Medical Assistant
Nurse Practitioner	Physician Assistant
Pharmacist	Pharmacist II
Clinical Laboratory Technologist I and II	Pharmacy Technician

For existing classifications, the scope of practice and licensing/certification requirements were updated to meet current applicable State of California laws and regulations. In addition, four (4) new classifications are proposed to meet campuses' operational needs. The draft standards are based on the results of an internal campus needs assessment survey and external data collection and analysis with other

Distribution:

CSU Presidents
Vice Chancellor, Human Resources
Vice Presidents, Student Affairs
Chair, CSU Health Services Advisory Committee

universities and governing state agencies, as well as review by health services experts and human resource representatives.

Campus Review: As you review these materials, please consider the following¹:

- *Do the proposed classification standards provide an umbrella under which you can equitably classify your positions?*
- *Are the different classifications within a series properly defined? Are the distinctions between classifications clear?*
- *Do the standards adequately cover the breadth of work performed by incumbents today? In the next few years?*
- *Is the language related to scope of practice and licensing and certification flexible enough to not be quickly outdated?*
- *Are the education, licensing/certification, knowledge and abilities requirements in the Typical Qualifications section appropriately defined?*
- *Are any critical work functions or abilities missing? If yes, please provide.*
- *Are the classifications flexible enough to meet the needs of all 23 campuses?*

Sending in Feedback: Thank you in advance for your time and effort in reviewing these drafts. We look forward to hearing from you by **Monday, June 7, 2004**. Please provide written comments to Gina Caywood via e-mail (preferred) to gcaywood@calstate.edu or fax at (562) 951-4954. If you have any questions regarding this technical letter, please contact Ms. Caywood at (562) 951-4416.

Next Steps: Campus feedback will be reviewed in June 2004 and revisions will be made, as appropriate, and reviewed with subject experts. The standards will be finalized in late June 2004 (date subject to change). After the draft classification standards are finalized, CSU will submit a Unit Modification Petition to the Public Employment Relations Board (PERB), requesting placement of the newly developed classifications in Unit 2. Once PERB assigns the proposed classification to a bargaining unit, impact bargaining (e.g., salary ranges and employee conversion) will begin with the appropriate bargaining representatives. Impact bargaining also may occur regarding classification changes.

This technical letter also is available on Human Resources Administration's Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>.

¹ Important Note: HR is aware that there are numerous questions regarding salary ranges, individual salaries, and impact to employees. At this point, we do not have answers to these questions because these topics are subject to collective bargaining and will be addressed after the classification standards are finalized.

Study Classifications

This study involved a review and update of several existing classifications, as well as the development of four new classifications requested by campuses to meet operational needs and regulatory requirements. The scope of practice descriptions and licensing and certification requirements have been structured to be more generic than specific so that the standards do not become quickly outdated. In addition, the new/revised classification standards reflect consistent campus recommendations to better meet operational needs.

Following is a summary of the classifications included in this study and the sources for key scope of practice and licensing and certification information.

- **Clinic Support Series** – This series is comprised of two classifications, which provide basic technical, administrative, clerical and housekeeping services in support of Student Health Center operations. Phlebotomy work has been incorporated into this series.
 - **Clinical Assistant** – This revised classification combines the work of the Clinical Aid I and II and does not require any certification unless the incumbent is assigned phlebotomy work. Information on phlebotomy certification can be found on the California Department of Health Services Web site at: www.dhs.ca.gov/ps/ls/lfsb/Phlebotomy/PhlebFAQ.doc.
 - **Medical Assistant** – This is a new classification designed to be at a level above the Clinical Assistant. It is distinguished by formal training and certification, which also permits incumbents to administer medication employing a variety of methods. All work is performed under the supervision of a licensed practitioner in compliance with applicable state regulations. Source information for applicable regulations can be found on the California Medical Board's Web site at: www.medbd.ca.gov/MA.FAQ.htm.

- **Pharmacy Series** – This new series includes the existing Pharmacist classification, as well as two new classifications: Pharmacy Technician and Pharmacist II.
 - **Pharmacy Technician** – This is a new classification which covers technical and administrative support functions in support of pharmacy operations including the non-discretionary tasks associated with the processing and packaging of prescriptions. Source information for applicable certification requirements can be found on the California Pharmacy Board's Web site at: www.pharmacy.ca.gov/faq_pharmacy_technician.htm.

- **Pharmacist I** – This renamed and updated classification covers the same range of work as the current Pharmacist classification, but identities more of the administrative functions that may be involved.
 - **Pharmacist II** – Incumbents in this new classification are distinguished by responsibility for overall pharmacy operations and administration and by serving as the Pharmacist-in-Charge. In addition, incumbents may provide lead direction to other licensed pharmacists. More information on licensing requirements for both Pharmacist classifications can be found on the California Pharmacy Board's Web site at: www.pharmacy.ca.gov. The main information sources were the sections on licensing and compliance.
- **Clinical Laboratory Scientist** – This series continues to contain two levels but has been renamed for consistency with the current state licensing designation. Class standards have been updated to reflect current licensing information. More information on Clinical Laboratory Scientists can be found on the California Department of Health Services' Web site at: www.dhs.ca.gov/ps/ls/LFSB/html/personnel.htm.
- **Clinical Laboratory Scientist I** - Incumbents are licensed professionals responsible for the performance of a wide variety of clinical laboratory tests and examinations where most of the steps are well-defined or delineated. Incumbents may have administrative responsibility for a laboratory on a smaller campus, but in all cases must have access to a higher-level scientist or clinical pathologist for referral of unique, complex, or extraordinary tests.
 - **Clinical Laboratory Scientist II** - Incumbents are distinguished by the overall administrative and operational responsibility for a laboratory, the skill required to introduce new tests and perform more complex tests, **and/or** the responsibility for providing lead work direction to other Clinical Laboratory Scientists.
- **Nurse Practitioner** – This classification has been updated to reflect current scope of practice information and certification requirements. More information for Nurse Practitioners can be found on the California Registered Nursing Board's Web site at: www.rn.ca.gov/policies/policies.htm#NP.
- **Physician Assistant** – This is a new classification. Physician Assistants perform duties comparable to the Nurse Practitioner, but are distinguished by how incumbents obtain their preparatory education and training and the agency governing licensing. Physician Assistants must have completed an approved Physician Assistant program and are licensed by the Physician Assistant Committee of California. More information can be found on the California Department of Consumer Affairs' Web site at: www.physicianassistant.ca.gov/what_is.htm.

CLINIC SUPPORT SERIES
DRAFT CLASSIFICATION SERIES

Series Overview:

The Clinic Support classification series is comprised of two classifications that provide basic technical, administrative, clerical and housekeeping services to support Student Health Center operations. Typically, incumbents are assigned to nursing support, but also may be assigned to other clinical departments such as the laboratory, pharmacy, radiology, optometry or physical therapy services. Clinical and medical support functions are performed under the supervision of licensed professionals and do not involve any assessments or treatments that may only be performed by licensed professionals. Some positions may require incumbents to possess and maintain certification as a Phlebotomy Technician I, which permits them to draw blood using skin puncture or venipuncture.

Formal training and certification requirements distinguish the two classifications within the series as follows:

- ***Clinical Assistant*** – Incumbents perform a variety of standard and semi-skilled clinical assistance, clerical and housekeeping duties in support of Student Health Center operations. Work is performed under the supervision of a licensed professional. Incumbents are not required to possess any formal training or certification, unless they are assigned responsibility for phlebotomy.
- ***Medical Assistant*** – Incumbents perform many of the same duties as the Clinical Assistant, but are distinguished by their formal training and certification, which also permits incumbents to administer medication employing a variety of means, including injection, under the supervision of a licensed practitioner in compliance with applicable state regulations. Incumbents must possess and maintain certification through an approved private or national certification program or association or by a CSU physician. The requirements of the formal training are outlined under the typical qualifications for Medical Assistant.

Clinical Assistant (combines current Clinical Aid I and II)

Under regular supervision, Clinical Assistants perform a variety of standard and semi-skilled clinical assistance, clerical and housekeeping duties in support of Student Health Center operations. Incumbents follow standard procedures and protocols. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Clinical Assistants; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities and may be focused in one or more clinical departments within the Student Health Center.

- ◆ Support the full range of clerical and administrative functions within the health center including appointment scheduling for practitioners, patient reception, locating and distributing medical records to practitioners, and processing and filing of medical documents.
- ◆ Coordinate patient flow, including escorting patients to clinical areas and instructing them on how to prepare for examinations or medical treatments.
- ◆ Prepare examining and treatment rooms, including changing linens, setting up treatment trays, and sterilizing and setting up instrument trays and equipment as required by the practitioner.

- ◆ Collect, record, and monitor patient data and routine measurements, such as height, weight and temperature and vital signs such as blood pressure and pulse.
- ◆ Assist practitioners in the delivery of such health care services as examinations, clinical procedures and medical treatments.
- ◆ Perform a variety of standard tests and limited procedures not requiring a licensed professional such as vision screening, hearing tests, electrocardiograms, removal of sutures and bandages, removal of casts and splints and other external devices, nasal smears of the nasal cavity only, ear lavage, and specimen collection by non-invasive techniques.
- ◆ Ensure health care delivery areas are fully stocked, organized, clean and disinfected as necessary. Order supplies as necessary. Clean and/or autoclave instruments, equipment and glassware.
- ◆ Perform housekeeping within the student health center including incidental cleaning of appliances and utility equipment.
- ◆ Work with practitioners to ensure patient rights to privacy, safety and confidentiality are maintained.
- ◆ May serve as a phlebotomist for the student health center, which requires special certification and entails drawing blood by skin puncture and venipuncture to provide samples for clinical analysis and testing.
- ◆ May be assigned to support other clinical departments such as the pharmacy, optometry, radiology, clinical laboratory or physical therapy, and perform a similar range of support duties that do not require licensing or certification.

Typical Qualifications

- **Education and Experience** – Incumbents must possess a high school diploma or equivalent. In addition, incumbents must possess sufficient experience in a medical setting to support the performance of the duties described above, which typically falls in the range of six months to one year of experience.
- **Certification** – No certification or licensing is required for the Clinical Assistant, unless the incumbent is assigned responsibility for phlebotomy. In this case, the incumbent must possess and maintain certification as a Certified Phlebotomy Technician I, which permits the incumbent to perform skin punctures and venipuncture. Phlebotomy certification requires:
 1. A high school diploma or equivalent; **and**
 2. Completion of required hours of classroom instruction and practical training or equivalent training and experience depending on date of entry to the field; **and**
 3. Passing an examination as required by Laboratory Field Services under the California Department of Health Services.
- **Knowledge** – Working knowledge of daily clinic operations and organization ranging from patient scheduling and reception to delivery of health care services and processing of paperwork; aseptic techniques and requirements; and the uses, application and proper operation of various medical supplies and equipment used in performing the duties described above such as those used in obtaining patient vital signs, performing tests, conducting medical examinations and providing treatments.

- **Abilities** – Incumbents must be able to understand and use medical terminology to accurately and efficiently support practitioners and follow their instructions; perform semi-skilled clinical assistance activities accurately and timely; handle instruments and equipment properly; read and write English at a level to support maintaining accurate records and reading medical terminology; use health center automated systems to maintain data and prepare simple reports; and maintain effective working relationships with practitioners and other health center support staff, as well as work with patients.

Medical Assistant (New classification)

Medical Assistants perform a variety of medical technical support services within their scope of practice as defined by the California Board of Medicine. Medical Assistants are distinguished from Clinical Assistants by their formal training and certification, which also permits them to administer medication employing a variety of means, including injection, under the supervision of a licensed practitioner in compliance with applicable state regulations. Medical Assistants must possess and maintain certification through an approved private or public certification program or association or by a CSU physician.

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Medical Assistants; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities and may be focused in one or more clinical departments within a Student Health Center.

In addition to the duties performed by a Clinical Assistant, the Medical Assistant typically performs the following duties within their scope of practice:

- ◆ Administers medication by intramuscular, intradermal or subcutaneous methods, as well as by inhalation, orally, sublingually or other methods and perform injections. In all cases, a licensed practitioner must verify medication dosage.
- ◆ Performs TB skin tests and measure and describe results and refer for interpretation.
- ◆ Performs other related duties within their scope of practice as defined by the California Board of Medicine.
- ◆ May serve as a phlebotomist for a Student Health Center, which requires special certification and entails drawing blood by skin punctures and venipuncture to provide samples for clinical analysis and testing.

Typical Qualifications

- **Education and Experience** - A high school diploma or equivalent is required. In addition to the education and experience requirements for the Clinical Assistant, Medical Assistants must have successfully completed the minimum required hours and type of training needed to perform injections and administer medication as outlined by the California Board of Medicine.
- **Certification** – In order to perform the duties of a Medical Assistant, incumbents must possess and maintain active certification from one of the following:
 1. A national or private Medical Assistant certification program or association approved by the Medical Board of California; **or**

2. A CSU Physician who certifies and documents in writing that the formal training and clinical practice hours required by the California Board of Medicine to perform the duties of a Medical Assistant have been successfully completed.

Incumbents assigned to work as a Phlebotomist must possess and maintain certification as a Certified Phlebotomy Technician I as described above under the Clinical Assistant.

- **Knowledge** – In addition to the knowledge requirements of the Clinical Assistant, the Medical Assistant must possess a basic knowledge of anatomy and physiology appropriate to the duties performed; understand the potential hazards or complications resulting from administering medications and know how to initiate emergency procedures; and possess working knowledge of California laws and regulations pertaining to medical assistants.
- **Abilities** – In addition to the abilities identified for the Clinical Assistant, the Medical Assistant must demonstrate the proper techniques in administering medications in a variety of manners including by intramuscular, intradermal or subcutaneous methods and by inhalation; and demonstrate the proper techniques in performing injections.

PHARMACY SERIES

DRAFT CLASSIFICATION SERIES

Series Overview:

The Pharmacy series is comprised of three classifications, which provide either technical pharmacy support or perform professional pharmacy and administrative functions within a campus Student Health Center Pharmacy.

- ***Pharmacy Technician*** – Incumbents perform a variety of technical and administrative functions in support of pharmacy operations, including the non-discretionary tasks associated with the processing and packaging of prescriptions, under the supervision of a licensed pharmacist. Incumbents must possess and maintain certification as a registered pharmacy technician through the Pharmacy Technician Certification Board to work in a California pharmacy.
- ***Pharmacist I*** – Incumbents are licensed professionals who perform general pharmacy duties, including consulting with the prescriber and patient; identifying, evaluating and interpreting prescriptions; and compounding and dispensing medications and other therapeutic agents. Incumbents may be responsible for pharmacy administration within a student health center on a campus with a smaller student population, which may include serving as the Pharmacist-in-Charge as defined and required by the California Board of Pharmacy.
- ***Pharmacist II*** – Incumbents are distinguished by responsibility for overall pharmacy operations and administration and serve as the Pharmacist-in-Charge as defined and required by the California Board of Pharmacy. In addition, incumbents may provide lead work direction to other licensed pharmacists.

Pharmacy Technician (new classification)

Under the supervision of a licensed Pharmacist, Pharmacy Technicians perform a variety of technical and administrative functions in support of pharmacy operations, including the non-discretionary tasks associated with the processing and packaging of prescriptions. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Pharmacy Technicians; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

- ◆ Review all incoming prescription orders and enter data into the pharmacy's automated system. Determine billing procedures and student eligibility.
- ◆ Process prescriptions including the manufacturing, packaging and labeling of drug products. May prepare and compound simple prescriptions for Pharmacist review.
- ◆ Compile and maintain appropriate medical and medication information and records from patients or their medical records in conformance with applicable university, state and federal regulations.
- ◆ Perform pharmacy-cashiering functions.

Typical Qualifications

- ***Education and Experience*** – Incumbents must possess a high school diploma or equivalent. In addition, incumbents **must** possess the necessary education and training to be a registered Pharmacy Technician, which requires either an Associates Degree in pharmacy technology **or** completion of an accredited pharmacy technician training program **or** equivalent training and experience, as defined and required by the California State Board of Pharmacy. Additionally, incumbents must possess sufficient experience to gain a working knowledge of pharmacy operations, typically ranging between six months to one year of experience working in a pharmacy setting as a clerk or technician.
- ***Certification/Licensing*** – Incumbents must possess and maintain certification as a registered Pharmacy Technician to work in a California pharmacy.
- ***Knowledge*** – Incumbents must possess a working knowledge of brand and generic drug names, prescription packaging and labeling, aseptic compounding procedures, and drug disposal protocols; general knowledge of different pharmacy operations and practices; familiarity with the standards, ethics, laws and regulations governing the practice of a pharmacy; and a general familiarity with the pharmaceutical theories, practices and procedures.
- ***Abilities*** – Incumbents must be able to understand and use pharmaceutical and medical terms, abbreviations, and symbols commonly used in prescribing, dispensing and record-keeping of medications; perform the record-keeping functions involved in and related to dispensing drugs; perform manufacturing, packaging and labeling of drug products; perform calculations required for common dosage determination, using both metric and apothecary systems; effectively use and maintain the pharmacy automated system to maintain records and perform cashiering functions; and maintain effective working relationships with practitioners and other health center support staff, as well as exhibit strong customer service skills with student patients.

Pharmacist I (Class code 7992)

Pharmacist I incumbents are licensed professionals who perform general pharmacy duties, including consulting with the prescriber and patient; identifying, evaluating and interpreting prescriptions; and compounding and dispensing medications and other therapeutic agents. Incumbents may be responsible for pharmacy administration within a student health center on a campus with a smaller student population, which may include serving as the Pharmacist-in-Charge, as defined and required by the California Board of Pharmacy. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Pharmacist I; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

- ◆ Interpret physician orders and select, compound, manufacture, and dispense prescriptions.
- ◆ Take and maintain appropriate patient drug and health histories.
- ◆ Counsel students regarding proper administration and storage of prescribed and over-the-counter medications. May develop educational materials for students relative to pharmaceuticals.

- ◆ Consult with and advise physicians and other practitioners on drug selection, dosage, and administration; drug action and side effects; drug interactions; alternative drug therapies; and drug availability and cost.
- ◆ Ensure proper maintenance of detailed prescription records, as well as inventory records on drugs, narcotics, and poisons and prepare and file necessary reports as required by the university and applicable state and federal laws and regulations.
- ◆ Maintain, order, and receive pharmaceuticals and supplies.
- ◆ Assist in the accurate completion of insurance forms and related paperwork.
- ◆ Keep current with developments in the pharmaceutical field and in areas affecting pharmacy operations.
- ◆ May serve as the Pharmacist-in-Charge on smaller campuses, which entails ensuring the pharmacy is in compliance with all state and federal licensing and regulatory requirements on an ongoing basis, ensuring pharmacy staff are competently trained, and responsibility for daily pharmacy operations and quality assurance.
- ◆ May be responsible for pharmacy administration including coordinating pharmacy operations and participating in the development and implementation pharmacy policies and procedures.
- ◆ May provide lead work direction to technical and administrative support staff within the student health center pharmacy, such as pharmacy technicians and clerks. Lead work direction involves organizing and planning work; training and orienting employees, scheduling pharmacy staff, assigning work, reviewing work, and providing input to employee selection and performance evaluations.

Typical Qualifications

- ***Education and Experience*** – Graduation from a recognized and accredited College of Pharmacy with a Bachelor's degree in pharmacy or equivalent. In addition, one year of experience as a licensed pharmacist or equivalent to demonstrate the professional and technical competencies and abilities necessary to work independently and assume administrative responsibilities within the pharmacy.
- ***Licensing*** – Incumbents must possess and maintain a valid license to practice as a registered pharmacist in the State of California.
- ***Knowledge*** – Incumbents must possess the knowledge to work as a licensed pharmacist including, but not limited to, a thorough knowledge of all drugs, chemicals and supplies required in the operation of the Student Health Center Pharmacy; a comprehensive knowledge of the laws and regulations pertaining to the dispensing, storage, and recordkeeping of drugs, narcotics and poisons; a working knowledge of automated pharmacy systems; a general knowledge of pharmacy administration; and a working knowledge of campus procurement and budgetary processes.
- ***Abilities*** – Incumbents must be able to independently perform the duties of a licensed pharmacist including, but not limited to, compounding and filling prescriptions; evaluating written physician orders to determine ingredients needed and to ensure proper dosages and that combinations will not result in toxic compounds or effects; serving as a resource to practitioners and other medical support staff in the areas of pharmacology, drug combination, drug interaction and alternative drug therapies; preparing and maintaining accurate records and reports; establishing and maintaining effective working relationships with other health center staff and management and providing support to student patients; and providing lead work direction to pharmacy support staff.

Pharmacist II (New classification)

The Pharmacist II is responsible for ensuring the delivery of student health center pharmacy services in accordance with established professional and legal standards. Incumbents in this classification are distinguished by one or more the following: responsibility for overall pharmacy administration and operations; serving as the Pharmacist-in-Charge as defined and required by the California Board of Pharmacy; and/or providing lead work direction to other licensed pharmacists. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Pharmacist II; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

In addition to the general duties of a Pharmacist I, the Pharmacist II *may* perform the following:

- ◆ Administer overall pharmacy operations including planning and organizing ongoing operations; scheduling staff; and developing and monitoring the pharmacy budget.
- ◆ Serve as the Pharmacist-in-Charge, which entails ensuring the pharmacy is in compliance with all state and federal licensing and regulatory requirements on an ongoing basis, ensuring pharmacy staff are competently trained, and responsibility for daily pharmacy operations and quality assurance.
- ◆ Work with the health center management team in the development, implementation, documentation and communication of pharmacy policies, procedures, and protocols; quality assurance programs; and security measures and programs.
- ◆ Consult with medical and nursing staff on their needs relative to pharmacy operations.
- ◆ Develop and maintain student health center pharmacy formulary and inventory.
- ◆ Ensure pharmacy inventory is complete and accurate; monitor for proper utilization of pharmaceuticals; ensure timely ordering of pharmaceuticals and supplies; ensure safety of pharmaceuticals dispensed; and ensure prompt and proper disposal of expired medications.
- ◆ May provide lead direction to other licensed pharmacists, in addition to pharmacy support staff.

Typical Qualifications

- ***Education and Experience*** – In addition to the education and experience of a Pharmacist I, the Pharmacist II must demonstrate sufficient experience to oversee the operations of a pharmacy and serve as the Pharmacist-in-Charge, as well as to provide work direction to other professionals. Typically, three to five years of experience working as a licensed pharmacist with progressive operational and administrative responsibilities is necessary to gain the appropriate level of experience.
- ***Licensing*** – Incumbents must possess and maintain a valid license to practice as a registered pharmacist in the State of California.
- ***Knowledge*** – In addition to the knowledge required of a Pharmacist I, the Pharmacist II must possess a comprehensive and in-depth knowledge of all state and federal laws pertaining to pharmacy operations; a thorough knowledge of pharmacy operations and administration; and a working knowledge of campus budgetary and human resource processes and procedures.

- *Abilities* – In addition to the abilities required of a Pharmacist I, the Pharmacist II must be able to develop, implement, and communicate pharmacy policies, procedures and protocols, including those related pharmacy security; develop a quality assurance program and ensure ongoing compliance; develop and implement a pharmacy budget; and provide lead work direction to other professionals.

CLINICAL LABORATORY SCIENTIST SERIES
DRAFT CLASSIFICATION SERIES

Series Overview

The Clinical Laboratory Scientist series is comprised of two classifications with progressive responsibility for performing a wide variety of clinical laboratory tests, including chemical, microscopic and bacteriologic tests. Tests provide the medical staff with essential data and information for the prevention, diagnosis and treatment of illnesses, diseases and other conditions found within the university setting. Incumbents also are responsible for maintaining the laboratory in support of Student Health Center operations.

- ◆ ***Clinical Laboratory Scientist I*** – Incumbents are licensed professionals responsible for the performance of a wide variety of clinical laboratory tests and examinations where most of the steps are well-defined or delineated. Incumbents may be responsible for overall laboratory administration on a small campus, but in all cases, must have access to a clinical pathologist or higher level scientist for referral of unique, complex, or extraordinary tests.
- ◆ ***Clinical Laboratory Scientist II*** - Incumbents are distinguished by the skill required to perform more advanced and complex tests and adapt and introduce new laboratory tests and by serving as a technical consultant within the laboratory. In addition, incumbents may be responsible for laboratory administration and daily operations, which may include providing lead work direction to other Clinical Laboratory Scientists, as well as technical support staff.

Clinical Laboratory Scientist I (7927)

Clinical Laboratory Scientist I incumbents are licensed professionals responsible for the performance of a wide variety of clinical laboratory tests using manual methods or applicable mechanical and electronic equipment. In most cases, testing steps are well-defined and delineated; however, some tests may be moderately complex in nature, involving multiple steps and procedures, and requiring professional judgment. Incumbents work under the direction of a consulting pathologist and/or a more senior scientist who spot checks work and is available for referral on unique, complex, or extraordinary tests.

The following examples of typical work activities are meant to illustrate the general range of work functions performed by the Clinical Laboratory Scientist I; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

- ◆ Perform clinical laboratory tests such as chemical, physical, microscopic, microbiological, bacteriologic, hematological, cytological, and other laboratory

Draft Clinical Laboratory Scientist Series

diagnostic tests ordered by a physician and/or pathologist. Frequently performed tests include routine urinalysis, pregnancy tests, blood tests, and antibiotic sensitivity tests.

- ◆ Collect specimens to perform tests and prepare solutions, reagents and media used in the laboratory.
- ◆ Read test results and examine and interpret outcomes to identify abnormalities. Perform mathematical calculations related to testing and analysis. Use knowledge of physiological significance of test results to describe the condition that causes a disease, but not the disease itself. Provide results to practitioners.
- ◆ Use manual and computerized data and reporting systems to maintain records of laboratory tests conducted, prepare and maintain patient data, and prepare reports.
- ◆ Conduct quality control measures and maintain a safe laboratory environment in accordance with established standards, protocols and safety regulations. Ensure compliance with infection control policies and blood borne pathogen safety precautions.
- ◆ Operate and maintain instruments and equipment utilizing established procedures. Conduct routine calibration and/or standardization of instruments.
- ◆ Maintain laboratory, materials and equipment in orderly condition. Ensure supply and materials are maintained at adequate levels. Perform autoclaving and sterilize glassware, tubes and instruments.
- ◆ May serve as a phlebotomist for the student health center, which requires special certification and entails drawing blood by skin puncture and venipuncture to provide samples for clinical analysis and testing.
- ◆ May be responsible for laboratory administration on a smaller campus including coordinating operations and participating in the development of policies and procedures. In addition, may provide lead work direction to technical support within the laboratory. Lead work direction involves organizing and planning work; training and orienting employees, scheduling staff and assigning work, reviewing work, and providing input to employee selection and performance evaluations.

Typical Qualifications

- ***Education and Experience*** – Incumbents must possess a bachelor’s degree in clinical laboratory science or equivalent from an accredited institution **or** possess equivalent post-secondary coursework, training and experience as defined by the California Division of Laboratory Science. In addition, incumbents must possess sufficient experience to demonstrate the professional and technical competencies to independently perform the duties of the position.
- ***Licensing/Certification*** – Incumbents must possess and maintain a valid Clinical Laboratory Scientist license.

In addition, incumbents assigned to perform phlebotomy must possess and maintain certification as a Certified Phlebotomy Technician I, which permits the incumbent to perform skin punctures and venipuncture. Phlebotomy certification requires:

Draft Clinical Laboratory Scientist Series

1. A high school diploma or equivalent; **and**
 2. Completion of required hours of classroom instruction and practical training or equivalent training and experience depending on date of entry to the field; **and**
 3. Passing an examination as required by Laboratory Field Services under the California Department of Health Services.
- **Knowledge** – Incumbents must possess a thorough knowledge of the theories, principles and practices of clinical laboratory science including the use and care of all applicable laboratory equipment; working knowledge of the preparation, mounting and staining of specimens; working knowledge of various laboratory tests and procedures including chemical, physical, microscopic, microbiological, bacteriologic, serological, hematological, cytological, and other laboratory diagnostic tests; working knowledge of automated computer systems used in clinical laboratory settings; general knowledge of clinical laboratory quality control procedures, protocols and standards; and general knowledge of state and federal regulations pertaining to the operation of a clinical laboratory.
- **Abilities** – Incumbents must be able to identify incongruities in test procedures and identify inconsistencies in reports of test results for a patient; demonstrate skill in the performance of a variety of laboratory analyses and evaluate information against measurable criteria; notice pertinent details of specimens under microscopic study; perform applicable mathematical calculations rapidly and accurately; keep current in developments in the field of clinical laboratory science; and provide lead work direction to support staff.

Clinical Laboratory Scientist II (7926)

Clinical Laboratory Technologist II incumbents perform both standard and non-standard clinical laboratory tests and examinations, which are often more advanced and complex. In many cases, steps are not clearly delineated and tests may require modification and adaptation, which involves the use of considerable professional judgment and analysis. In addition, incumbents serve as a technical consultant and may be responsible for laboratory administration and operation, including supporting laboratory compliance and developing and implementing new or modified laboratory procedures and protocols. Operational responsibilities also may include providing lead work direction to one or more Clinical Laboratory Scientists, as well as technical support staff. The following examples of typical work activities are meant to illustrate the general range of work functions performed by the Clinical Laboratory Scientist II; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

In addition to the general duties of the Clinical Laboratory Scientist I, the Clinical Laboratory Scientist II *may* perform the following:

Draft Clinical Laboratory Scientist Series

- ◆ Perform a variety of non-standard, complex, advanced, as well as standard clinical laboratory tests. Adapt, develop and introduce new test procedures and methodologies into the laboratory, including developing and documenting new protocols. Instruct other laboratory staff in the performance of new and modified procedures and methods.
- ◆ Collect and extrapolate data on new procedures and methods to develop test criteria and standards. Investigate procedural modifications and unexpected test results to determine reasons for nonconformance with established patterns. Consult with physicians on test results and explore alternative methods for verifying results.
- ◆ Establish and/or modify quality control criteria for measuring the accuracy of results.
- ◆ Set up new equipment and adapt laboratory guidelines and protocols for new or modified processes and adapt manual tests for automated processing.
- ◆ Perform a variety of administrative functions within the laboratory including coordinating daily operations, administering quality control programs, ensuring proper use of equipment and materials, ensuring adequate supply levels, and preparing laboratory operational and compliance reports.
- ◆ Provide lead work direction to one or more Clinical Laboratory Scientists, as well as to technical support staff within the laboratory. Lead work direction involves organizing and planning work; training and orienting employees, scheduling staff and assigning work, reviewing work, and providing input to employee selection and performance evaluations.

Typical Qualifications

In addition to the typical qualifications outlined for the Clinical Laboratory Scientist I, the Clinical Laboratory Scientist II must possess the following:

- ***Education and Experience*** – Incumbents must possess the same educational requirements as the Clinical Laboratory Scientist I. In addition, incumbents must possess sufficient experience to demonstrate the professional and technical competencies to independently perform the complex duties of a Clinical Laboratory Scientist II, which typically would be in the range of two years of increasing responsibility within a clinical laboratory.
- ***Licensing/Certification*** – Licensing requirements are the same as for the Clinical Laboratory Scientist I, including certification as a Phlebotomy Technician I if the position is assigned responsibility for phlebotomy.
- ***Knowledge*** – In addition to the knowledge required of a Clinical Laboratory Scientist I, Clinical Laboratory Scientist II incumbents must possess a comprehensive and in-depth knowledge of the theories, principles and practices of clinical laboratory science, including the use and care of applicable equipment and systems; thorough knowledge of clinical laboratory quality control procedures, protocols and standards; thorough knowledge of various laboratory tests and procedures including chemical, physical, microscopic, microbiological, bacteriologic, serological, hematological, cytological, and other laboratory diagnostic tests; thorough knowledge of automated

Draft Clinical Laboratory Scientist Series

computer systems used in clinical laboratory settings; and thorough knowledge of federal and state regulations pertaining to clinical laboratories.

- ◆ **Abilities** – In addition to the abilities outlined for the Clinical Laboratory Scientist I, Clinical Laboratory Scientist II incumbents must be able to serve as a technical consultant within the laboratory; identify and locate sources of information about various new tests and uses of new equipment; demonstrate competency in the performance of complex and advanced laboratory analyses; adapt and introduce new and modified tests into the laboratory; evaluate tests results and data against measurable criteria; extrapolate data to develop new test criteria and standards; identify incongruities in test procedures and inconsistencies in reports of test results for patients; develop procedures, quality control checks and instructions necessary for new or modified tests; plan, schedule and carry out laboratory activities to meet administrative guidelines and medical needs; serve as a resource for a variety of established and standardized laboratory procedures; keep records and prepare various administrative and laboratory analysis reports; and provide lead work direction to professional and support laboratory staff.

NURSE PRACTITIONER
DRAFT CLASSIFICATION STANDARD

Class Code: 8165 - 8166
Date Established: 11-19-76
Date Revised: XX-XX-04

Classification Overview

The Nurse Practitioner is a licensed highly skilled health care practitioner who provides a wide range of primary health care services within a Student Health Center including diagnostic, preventive and health maintenance services. Incumbents work under the direction of a physician using established standardized procedures and protocols. Nurse Practitioners are licensed registered nurses, but are distinguished by additional advanced education and training and certification to practice as a Nurse Practitioner in a specialty area.

Nurse Practitioners and Physician Assistants perform comparable duties, but are distinguished by how incumbents obtain preparatory education and training and by the agency governing licensing and certification. Nurse Practitioners must complete a training program approved by and possess certification from the California Board of Registered Nursing, while Physician Assistants must have completed an approved Physician Assistant program and are licensed by the Physician Assistant Committee of California.

Typical Activities

Under the direction of a physician, Nurse Practitioners work independently according to established standardized procedure and protocols. Incumbents provide a wide range of primary health care services, such as conducting physical examinations, diagnosing and treating illnesses, ordering and interpreting tests, and counseling patients on preventive care. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Nurse Practitioners; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

- ◆ Perform complete physical examinations including obtaining detailed medical histories using applicable clinical techniques and diagnostic tools.
- ◆ Diagnose common acute and chronic illnesses and injuries distinguishing between normal, normal variance, and abnormal findings based upon evaluation of the patient's medical history, physical examination, and test results.
- ◆ Order, interpret, and evaluate common laboratory, radiologic, cardiographic and other standard diagnostic tests and procedures. Interpret test results and analyze a patient's history and examination results to assess the patient's medical problems and needs and to develop treatment plans.

- ◆ Establish and document the health care treatment plan and prognosis, maintaining records of each case that are sufficiently complete for any physician and peer reviewing group to evaluate the effectiveness of the plan.
- ◆ Treat and manage patient health problems, including coordinating referrals to specialty (e.g., physical therapy, inhalation therapy, occupational therapy) and social services and recording progress notes and the provisions for continuity of care.
- ◆ May prescribe medications provided the incumbent has the delegated authority and furnishing number for doing so.
- ◆ Instruct and counsel patients regarding medical problems, use of prescribed medications, compliance with prescribed therapeutic regimens, family planning, emotional problems, preventive health care and health maintenance.
- ◆ Perform procedures and minor surgeries such as injections, immunizations, lumbar punctures, skin biopsies, suturing and wound care, minor orthopedic procedures, and manage conditions produced by infection or trauma.
- ◆ Perform therapeutic procedures in response to life threatening situations.
- ◆ Collaborate and consult with physicians and other health care team professionals on more complicated health problems and referrals.
- ◆ Maintain compliance with established university policies, procedures and protocols for quality assurance and infection control.
- ◆ May provide lead work direction to medical and nursing clinic support staff. Lead work direction involves organizing and planning work, training and orienting employees, scheduling pharmacy staff, assigning work, reviewing work, and providing input to employee selection and performance evaluations.

Typical Qualifications

- ***Education and Experience*** – Nurse Practitioners must possess an academic degree or certificate from an approved college or university-based nurse practitioner program, which includes classroom instruction and clinical experience **or** possess equivalent training and experience as outlined by the California Board of Registered Nursing. Incumbents must be clinically competent in a specialty applicable to the population served within the Student Health Center and must possess sufficient experience to independently perform the duties of a licensed nurse practitioner within that specialty.
- ***Licensing and Certification*** – Incumbents must possess a valid California license as a registered nurse **and** certification as a nurse practitioner as required by the California Board of Registered Nursing. Nurse Practitioner certification requires successful completion of one of the following:
 1. A Nurse Practitioner course of study resulting in an academic degree from an approved program; **or**
 2. Passing the national examination for certification as a nurse practitioner in an applicable specialty; **or**
 3. Equivalent training and experience as defined by the California Board of Registered Nursing.

Additionally, incumbents must possess certification in a nurse practitioner specialty relevant to student health center patients.

- **Knowledge** - Incumbents must possess the knowledge to work as a licensed nurse practitioner including, but not limited to, a comprehensive knowledge of advanced nursing care principles, methods and procedures; a thorough knowledge of medical theories, practices and protocols relative to the scope of practice; a thorough knowledge of subject areas such as growth and development, pathophysiology, psychosocial assessment, pharmacology, nutrition, disease management and the principles of health maintenance; and a thorough knowledge of the applicable state and federal laws and regulations pertaining to practice as a nurse practitioner.

- **Abilities** - Incumbents must possess the abilities and clinical competence required to work as a licensed nurse practitioner including but not limited to the ability to work independently in assigned areas of practice established by the supervising physician; demonstrate clinical competence in eliciting patient histories, conducting examinations, diagnosing and treating acute and chronic illnesses, assessing patient needs and making appropriate referrals; competently use clinical techniques and diagnostic tools; competently interpret laboratory and other test results; keep current with developments in the medical field pertinent to the scope of practice; establish and maintain effective working relationships with other health center staff and patients; and provide lead work direction to nursing and support staff.

PHYSICIAN ASSISTANT

DRAFT CLASSIFICATION STANDARD

Classification Overview

The Physician Assistant is a licensed highly skilled health care practitioner who provides a wide range of primary health care services within a Student Health Center, including diagnostic, preventive and health maintenance services. The scope of practice for each incumbent is established in writing by the supervising physician and is limited to those functions that the physician determines an incumbent is competent to perform. Competency is determined based on an incumbent's education, training and experience.

Physician Assistants and Nurse Practitioners perform comparable duties but are distinguished by how incumbents obtain preparatory education and training and the agency governing licensing and certification. Physician Assistants are licensed by the Physician Assistant Committee of California and must have completed an approved Physician Assistant program, while the California Board of Registered Nursing oversees the training programs and certification of Nurse Practitioners.

Typical Activities

Under the direction of a physician, Physician Assistants work independently within their established scope of practice to provide a wide range of primary health care services, such as conducting physical examinations, diagnosing and treating illnesses, ordering and interpreting tests, counseling patients on preventive care, and prescribing medication. The following examples of typical work activities are meant to illustrate the general range of work functions performed by Physician Assistants; they are not meant to be all-inclusive or restrictive. Work assignments may involve related activities.

- ◆ Perform complete physical examinations including obtaining detailed medical histories using applicable clinical techniques and diagnostic tools.
- ◆ Diagnose common acute and chronic illnesses and injuries distinguishing between normal, normal variance, and abnormal findings based upon evaluation of the patient's medical history, physical examination, and test results.
- ◆ Order, interpret, and evaluate common laboratory, radiologic, cardiographic and other standard diagnostic tests and procedures. Interpret test results and analyze a patient's history and examination results to assess the patient's medical problems and needs and to develop treatment plans.
- ◆ Establish and document the health care treatment plan and prognosis for patients treated, maintaining records of each case that are sufficiently complete for any physician and peer reviewing group to evaluate the effectiveness of the plan.
- ◆ Treat and manage patient health problems, including prescribing medication, coordinating referrals to specialty (e.g., physical therapy, inhalation therapy, occupational therapy) and social services, and recording of progress notes and the provisions for continuity of care.
- ◆ Instruct and counsel patients regarding medical problems, use of prescribed medications, compliance with prescribed therapeutic regimens, family planning, emotional problems, preventive health care and health maintenance.

- ◆ Perform procedures and minor surgeries such as injections, immunizations, lumbar punctures, skin biopsies, suturing and wound care, minor orthopedic procedures, and manage conditions produced by infection or trauma.
- ◆ Perform therapeutic procedures in response to life threatening situations.
- ◆ Collaborate and consult with physicians and other health care professionals on more complicated health problems and referrals.
- ◆ Maintain compliance with established university policies, procedures and protocols for quality assurance and infection control.
- ◆ May provide lead work direction to medical or nursing clinic support staff. Lead work direction involves organizing and planning work, training and orienting employees, scheduling support staff, assigning and reviewing work, and providing input to employee selection and performance evaluations.

Typical Qualifications

- ***Education and Experience*** – Physician Assistants must possess an academic degree or certificate from an approved college or university-based physician assistant medical training program that includes classroom instruction and clinical experience **or** possess equivalent training and experience as outlined by the State of California Physician Assistant Committee. Incumbents must possess sufficient experience to independently perform the scope of practice identified for the position.
- ***Licensing*** – Incumbents must possess and maintain a valid license to practice as a Physician Assistant in the State of California. Licensing by the California Physician Assistant Committee requires passing the Physician Assistant National Certifying Examination (PANCE). Examinees must be graduates of an approved physician assistant program or possess equivalent training and experience to sit for the PANCE.
- ***Knowledge*** – Incumbents must possess the knowledge to work as a licensed physician assistant including, but not limited to, a thorough knowledge of medical theories, practices and protocols relative to the scope of practice; a thorough knowledge of subject areas such as growth and development, pathophysiology, psychosocial assessment, pharmacology, nutrition, disease management and the principles of health maintenance; and a thorough knowledge of the applicable state and federal laws and regulations pertaining to practice as a physician assistant.
- ***Abilities*** – Incumbents must possess the abilities and clinical competence required to work as a licensed physician assistant including, but not limited to the ability to work independently in assigned areas of practice established by the supervising physician; demonstrate clinical competence in eliciting patient histories, conducting examinations, diagnosing and treating acute and chronic illnesses, assessing patient needs and making appropriate referrals; competently use clinical techniques and diagnostic tools; competently interpret laboratory and other test results; keep current with developments in the medical field pertinent to the incumbent's scope of practice; establish and maintain effective working relationships with other health center staff and patients; and provide lead work direction to nursing and support staff.