Checklist for Adding a Service Line  
*Courtesy Sharon Davis, RN, RVT*  
*July, 2005*

### Description of Equipment

**Location of Equipment (Health System wide, a department, physician office)**

<table>
<thead>
<tr>
<th>Questions to Address</th>
<th>Consultants</th>
<th>Check Mark if Complete, Non-Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>What types of procedures would the equipment enable a practitioner to perform?</td>
<td>Practitioner wanting the equipment, literature search.</td>
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<tr>
<td>• Invasive</td>
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<tr>
<td>• Non-invasive</td>
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<tr>
<td>• High-risk</td>
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<tr>
<td>• Low-risk</td>
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<tr>
<td>• Estimated Volume of Procedures</td>
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<tr>
<td>What is the Cost of the Equipment? Has a Capital Purchase Request Form been completed? What is the return on the investment?</td>
<td>CFO, Controller and Director of Contract Management</td>
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<tr>
<td>Is the equipment ordered through a reputable manufacturer, a manufacturer that has been utilized before? Satisfied with service? Is the equipment standardized – meaning is it the same model that we already possess?</td>
<td>Director of Contract Management and Director of Facilities Management</td>
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<tr>
<td>Does this need to be incorporated into a preventative maintenance program?</td>
<td>Director of Facilities Management</td>
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<tr>
<td>Have you consulted with other departments that may be using this piece of equipment?</td>
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<tr>
<td>Have you consulted IS to see what is needed for the new capital request?</td>
<td>VP of Information Systems</td>
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<tr>
<td>What are the reimbursement and billing issues?</td>
<td>VP of Corporate Compliance, Compliance Auditor, Director of Managed Care Contracting, Director of Fiscal Services and Central Billing</td>
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<td>• Medicare</td>
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<td>• Medicaid</td>
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<tr>
<td>• Third Party</td>
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<tr>
<td>• Type of setting – office, hospital, surgery</td>
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<tr>
<td>Question</td>
<td>Responsible Parties</td>
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<td>------------------------------------------------------------------------</td>
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<tr>
<td>What are the safety issues surrounding the equipment?</td>
<td>Safety Officer, Director of Facilities Management and Risk Manager</td>
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<tr>
<td>• Checklist to ensure alarms are turned on, equipment is working properly, etc.</td>
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<tr>
<td>• Incorporate in Department Checklist</td>
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<td>• Manufacturer’s guidelines</td>
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<td>• FDA recalls, or other recalls and ECRI reports?</td>
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<tr>
<td>Construction or Renovation Required?</td>
<td>Director of Facilities Management</td>
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<tr>
<td>What is the Competency required for the practitioners:</td>
<td>Director of Medical Staff Services, Director of Education, Director of Human Resources, Director of Process Improvement, Quality Managers and Risk Manager</td>
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<tr>
<td>• Physician – Credentials Committee</td>
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<tr>
<td>• Health System Personnel – Look at Position Description, Competency Checklist for Department, type of education (Web Ed, written test, hands-on demonstration)</td>
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<td>• Quality Indicators to determine competency achieved.</td>
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<tr>
<td>Do standing orders, clinical practice guidelines, policies and procedures need to be revised or created?</td>
<td>Director of Case Management, Quality Managers and Legal Services</td>
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<tr>
<td>Does patient teaching material need to be developed? Will employees need to be trained and educated?</td>
<td>Director of Education</td>
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<tr>
<td>Does the equipment or medical product need to be marketed or advertised?</td>
<td>VP of Marketing, PR, HR and Development and Director of Public Relations</td>
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<tr>
<td>What are the JCAHO and NCQA standards?</td>
<td>Legal Services and Quality Management</td>
<td></td>
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</tbody>
</table>