

Medical Assistant Skills Guide
(Cross-referenced with Patient Care Technician)

Medical Assistants must be formally trained and demonstrate competency to perform any clinical tasks assigned to them. This form does not validate employee competency to perform tasks.

General Responsibilities	Policy*	PCT	MA
Patient Confidentiality/HIPAA	X.A	X	X
Risk Management/ Completing a VERITAS report	QSRP 10-10.01	X	X
Understanding Regulatory Agencies (TJC, TOSHA, CMS)	OP 10-10.24	X	X
Hand Washing Responsibilities	IP 10-10.07	X	X
Environment of Care Responsibilities/Tracers	SA 40-10.03	X	X
Universal Precautions	CL 30-04.16	X	X
Reports any missing information or findings to nurse and provider	HR Scope of Practice	X	X
Cleans exam rooms between patients and restocks rooms	IP 10-10.16	X	X
Monitors Refrigerator/Freezer temperatures (logs)	Safety SOP-Refrigerator and Freezer Monitoring	X	X
Locating appropriate biohazard waste disposal	Safety SOP-Hazardous Waste: Handling and Disposal	X	X
Occurrence Reporting: Veritas	QSRP 10-10.01	X	X
eStar Responsibilities			
Performing intake: <ul style="list-style-type: none"> Vital Signs Height/Weight Temperature Pulse Respiration Hearing/Visual Acuity Screening (adult/peds) Allergy Review Pain Screening Advanced Directive Screening Medication Review and Revision Abuse and neglect Suicide Risk Falls 		X	X
Reconciling outside information/medical records			X
Reconcile MHAV information			X
Ensures referrals, consults, and labs are submitted			X
Receive and send communication in message baskets and routes messages appropriately (to nurse or provider)			X
Scheduling appointments			X
Faxing through eStar		X	X
Populates a medication cart in Rx Star	AM 20-10.05		X
Communication			
Practices CREDO, HEARD, and AIDET		X	X
Communicates by learning needs for patient and family and provides handouts/materials		X	X
Activate Interpreter services when needed	OP 10-50.01	X	X
Communicates wait times and/or delays to patient and family		X	X
Telephone <ul style="list-style-type: none"> Messages Screening Call Backs 			X
Telehealth			
Uses phone etiquette	Standard Operating Procedure: Approved Telehealth/Teleconferencing Systems		X
Pre-work: <ul style="list-style-type: none"> Assists patient with troubleshooting Instructs patient on how to log in Sends tip sheets to patient 	Standard Operating Procedure: Approved Telehealth/Teleconferencing Systems		X
Pre-charting: <ul style="list-style-type: none"> Allergies Medications Current problems/complaints Surgical history Pharmacy update 	Standard Operating Procedure: Approved Telehealth/Teleconferencing Systems		X
Clinic Readiness			
Verifies all exam rooms are cleaned and stocked	IP 10-10.16	X	X

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Access and revises Patient Summary List	OP 10-10.20	X	X
Orders supplies when needed		X	X
Prior Authorization for treatment (precertification)			X
Calls patient from waiting room and places into exam room		X	X
Interview patient: <ul style="list-style-type: none"> chief complaint or reason for visit (eStar resource for all screenings) 			X
Available in exam room as needed and assists with procedures			X
Prepare patient for exam <ul style="list-style-type: none"> Instructions for gowns, positioning etc. 		X	X
Patient Education-Documents/handouts or other materials provided to the patient	CL 30-05.05	X	X
Universal Protocol (Time-Out)	CL 30-04.16	X	X
Orientation/Education			
Assists with new staff orienting to clinic	CL 20-07.02	X	X
Serves as a preceptor for new employees <ul style="list-style-type: none"> Completes orientation checklist for new hire 	CL 20-07.02	X	X
Attends educational offerings, committees, and focus groups	CL 20-07.02	X	X
Skills			
Sterile tray setup	Mosby's Sterile Field Prep (AMB)		X
Ultrasonic Sterilization	IP SOP: Cidex-Quality Control, Disinfection Procedures, Neutralization, and Spill Cleanup IP 10-10.12		X
Central Sterilization process	IP 10-10.12		X
High Level Disinfection (HLD)	IP SOP: Device Reprocessing with High Level Disinfection IP 10-10.12		X
Obtaining Vital Signs: <ul style="list-style-type: none"> Height/Weight Temperature Pulse-Radial and Apical Respirations Blood Pressure- Electronic and Manual 	Mosby's Nursing Skills	X	X
Phlebotomy <ul style="list-style-type: none"> Venipuncture Capillary (A1C) 	CL30-08.05		X
CLIA waived-POCT: <ul style="list-style-type: none"> Fecal Occult Blood/FIT test Gastric pH Occult Blood Urine Dip Stick Blood Glucose Urine Toxicology 	CL 30-08.20	X	X
Specimen Collection: <ul style="list-style-type: none"> Urine Throat Nasal Vaginal Wound Cultures Stool Sputum 	CL 30-08.20	*Urine and Stool only by PCT*	X
Dry Sterile Dressing application	CL SOP-Wound Care, (Advanced) Specialty Dressings	X	X
Suture and staple removal	Mosby's Staple and Suture Removal (AMB)		X
Steri-Strips application and removal	Mosby's Staple and Suture Removal (AMB)		X
Intermittent urinary catheterization and care	CL 30-15.05	X	X
Indwelling urinary catheter insertion and care	CL 30-15.05	X	X
Intake and output measurement	Mosby's: Assessment Intake and Output	X	X
EKG standard 12 lead	Mosby's: Electrocardiogram 12 Lead (AMB)		X

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