

Medical Assistant

Competency checklist

A. General Patient Care
Tasks:
T1. Identify patient
T2. Prepare examination/procedure room
T3. Ensure patient safety within the clinical setting
T4. Complete a comprehensive clinical intake process, including the purpose of the visit
T5. Measure vital signs
T6. Obtain anthropometric measurements
T7. Identify/document/report abnormal signs and symptoms
T8. Assist provider with general physical examination
T9. Assist provider with specialty examinations
T10. Prepare patient for procedures
T11. Prepare and administer medications, vaccinations and/or injectables using nonparenteral and parenteral routes (excluding IV) (for example, oral, buccal, sublingual, intramuscular, intradermal, subcutaneous, topical, transdermal, and inhalation)
T12. Perform staple and suture removal
T13. Administer eye, ear, and topical medications
T14. Perform ear and eye irrigation
T15. Administer first aid and basic wound care
T16. Identify and respond to emergency/priority situations
T17. Perform CPR
T18. Assist provider with patients presenting with minor and traumatic injury
T19. Assist with surgical interventions (for example, sebaceous cyst removal, toe nail removal, colposcopy, cryosurgery)
T20. Review provider's discharge instructions/plan of care with patients
T21. Follow guidelines for sending orders for prescriptions and refills by telephone, fax, or email
T22. Document relevant aspects of patient care in patient record
T23. Operate basic functions of an EHR/EMR system
T24. Perform DOT physicals and assist with DOT paperwork
B. Infection control
Tasks:
T1. Adhere to regulations and guidelines related to infection control
T2. Adhere to guidelines regarding hand hygiene

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T3. Perform disinfection/sanitization
T4. Perform sterilization of medical equipment
T5. Perform appropriate aseptic techniques for various clinical situations
T6. Dispose of biohazardous materials as dictated by OSHA (for example, sharps containers, red bags)
C. Testing and Laboratory Procedures
Tasks:
T1. Collect non-blood specimens (for example, urine, stool, cultures, sputum)
T2. Perform CLIA-waived testing (labs)
T3. Perform vision and hearing tests
T4. Perform allergy testing
T5. Perform spirometry/pulmonary function tests (electronic or manual)
T6. Recognize, document, and report normal and abnormal laboratory and test values
T7. Match and label specimen to patient and completed requisition
T8. Process, handle, and transport collected specimens
D. Phlebotomy
Tasks:
T1. Verify order details
T2. Select appropriate supplies for test(s) ordered
T3. Determine venipuncture site accessibility based on patient age and condition
T4. Prepare site for venipuncture
T5. Perform venipuncture
T6. Perform capillary puncture
T7. Perform post-procedural care
T8. Handle blood samples as required for diagnostic purposes
T9. Process blood specimens for laboratory
T10. Match and label specimen to patient and completed requisition
T11. Recognize and respond to abnormal test results
T12. Prepare samples for transportation to a reference (outside) laboratory
T13. Follow guidelines in distributing laboratory results to ordering providers after matching patient to provider
E. EKG and Cardiovascular Testing
Tasks:
T1. Prepare patients for procedure

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T2. Perform cardiac monitoring (EKG, ECG) tests
T3. Ensure proper functioning of EKG equipment
T4. Recognize abnormal or emergent EKG results (for example, dysrhythmia, arrhythmia, versus artifact)
T5. Transmit results or report to patient's EMR or paper chart, and provider
4. Patient Care Coordination and Education
Tasks:
T1. Review patient record prior to visit to ensure health care is comprehensively addressed
T2. Collaborate with healthcare providers and community-based organizations
T3. Assist providers in coordinating care with community agencies for clinical and non-clinical services
T4. Facilitate patient compliance (for example, continuity of care, follow up, medication compliance) to optimize health outcomes
T5. Participate in transition of care for patients
T6. Participate in team-based patient care (for example, patient-centered medical home [PCMH], Accountable Care Organization [ACO])
5. Administrative Assisting
Tasks:
T1. Schedule and monitor patient appointments using electronic and paper-based systems
T2. Verify insurance coverage/financial eligibility
T3. Identify and check patients in/out
T4. Verify diagnostic and procedural codes
T5. Obtain and verify prior authorizations and pre-certifications
T6. Prepare documentation and billing requests using current coding guidelines
T7. Ensure that documentation complies with government and insurance requirements
T8. Bill patients, insurers, and third party payers for services performed
T9. Assist/resolve billing issues with insurers and third party payers, including appeals and denials
T10. Manage electronic and paper medical records
T11. Facilitate/generate referrals to other healthcare providers and allied healthcare professionals
T12. Provide customer service and facilitate service recovery (for example, follow up patient calls, appointment confirmations, monitor patient flow sheets, collect on accounts, make up for poor customer service)
T13. Enter information into databases or spreadsheets (for example, Excel, EHR & EMR, billing modules, scheduling systems)

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T14. Participate in safety evaluations and report safety concerns
T15. Maintain inventory of clinical and administrative supplies
6. Communication and Customer Service
Tasks:
T1. Modify verbal and non-verbal communication for diverse audiences (for example providers, coworkers, supervisors, patients and caregivers, external providers)
T2. Modify verbal and non-verbal communications with patients and caregivers based on special considerations (for example pediatric, geriatric, hearing impaired, vision impaired, mentally handicapped or disabled)
T3. Clarify and relay communications between patients and providers
T4. Communicate on the telephone with patients and caregivers, providers, third party payers
T5. Prepare written/electronic communications/business correspondence
T6. Handle challenging/difficult customer service occurrences
T7. Engage in crucial conversations (with patients and caregivers/health care surrogates, staff, and providers)
T8. Facilitate and promote teamwork and team engagement
7. Medical Law and Ethics
Tasks:
T1. Comply with legal and regulatory requirements
T2. Adhere to professional codes of ethics
T3. Obtain, review, and comply with medical directives
T4. Obtain and document healthcare proxies and agents
T5. Provide, collect, and store MOLST forms (medical order for life sustaining treatment)
T6. Protect patient privacy and confidentiality, including medical records
T7. Adhere to legal requirements regarding reportable violations or incidents
T8. Identify personal or religious beliefs and values and provide unbiased care