

UCHC Competency Checklist: ORIENTATION

Position Title: Medical Assistant

Employee Name: _____

Unit: Med/Surg 5, SURG 7, ONC 6

Cluster Area: _____

Method of Instruction Key: P = Protocol/Procedure Review E = Education Session S = Self Learning Package C = Clinical Practice D = Demonstration	Method of Evaluation Key: O = Observation (in clinical setting) RD = Return Demonstration T = Written Test V = Verbal Review	Self-Assessment by Employee			Method of Instruction (Use Instruction Key on Left)	Validation of Competency		
		Never Done	Needs Review/ Practice	Competent		Date	Initials	Evaluation Method (Use Evaluation Key on Left)
All Core Competencies reviewed and documented in Central Orientation								
A. GETTING INTO THE SYSTEM								
Locates Hard Copy Manuals on Unit					E			
Locates On-Line Manuals					E			
Obtains Network & Unit Specific Access					E			
Identifies unit-based orientation plan and timing of evaluations					E			
Locates Educational Activity Records Binder/File					E			
Identifies Performance Improvement Indicators					E			
Places contact information onto disaster call tree & unit phone list					E			
Receives PREF for Position					E			
Recalls Proper Call-Out Procedures					E			
B. SAFETY/INFECTION CONTROL								
Locates fire alarms, extinguishers and exits					E			
Demonstrates appropriate use of Red-Bag Waste					E			
Reviews Safety Plan for unit					E			
Verbalizes the use and online location of Material Safety Data Sheets (MSDS)					E			
Identifies and locates personal protective equipment					E			
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Disposes of needles/sharps in designated container					E			
Demonstrates correct procedure for putting on and removing masks, gowns and gloves					E			
Demonstrates and adheres to specific isolation procedures according to UCHC policies					E			
Demonstrates proper care of linen (clean and soiled)					E			
C. COMMUNICATION								
Describes communication considerations for specific age groups								
Maintains patient confidentiality								
Answers phone according to UCHC standards								
Operates and answers nurse call system								
Adheres to customer services values of UCHC								
Uses effective written communication								
Uses effective verbal and nonverbal communication skills								
Discusses and demonstrates respect for patient rights								
Accesses email account								
Locates link to Patient Safety Net								
Documents vital signs, I&O's, weights and finger stick on appropriate paperwork								
D. CLERICAL SKILLS								
Identifies self and unit when answering the phone/greets patients and visitors								
Operates telephone: <ul style="list-style-type: none"> • Call pick-up function • Transfers calls • Places a call on hold, then resumes call 								
Promptly relays information to appropriate personnel								

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Identifies who takes a verbal/telephone report on critical lab values								
Identifies procedure for accessing transportation department								
Identifies mechanism to report equipment malfunction								
Operates fax machine/copy machine								
Locates on-call physician list								
Utilizes telephone/beeper system according to guidelines								
Obtains old medical records								
Assembles chart for new admission								
Completes admission paperwork/process								
Determines assignment of admission or transfer to appropriate MD/service								
Completes transfer paperwork/process								
Maintains charts/chart supplies								
Stocks charts with blank forms (progress notes) as needed								
Thins charts as needed and files contents appropriately								
Assists with appropriate completion of requisitions and referrals								
Locates/Completes/Restocks the following forms:								
• Clinical Chemistry								
• Hematology-blood bank								
• Blood Bank-Request for blood products								
• Blood Bank Release								
• Outpatient Lab Request Form								
• Microbiology Cultures								

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Copies patient record and prepares for patient transfer or discharge								
Completes death paperwork								
Completes pre-op paperwork								
Processes patient room changes								
Files paperwork in patient's chart								
Operates addressograph								
Schedules Tests and Procedures:								
• Case Management Consult								
• CT Scans								
• Dietary Consults								
• Echocardiograms								
• EEG's/EMG's/Evoked Potentials								
• MRI Studies								
• Nuclear Medicine Tests								
• Pulmonary Function Tests								
• Radiology Studies								
• Rehabilitation Services (PT, OT, ST, Psych OT)								
• Respiratory Treatments								
• Social Service Consults								
• Stress Tests								
• Ultrasounds								
• Vascular Studies								

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E. MATERIALS MANAGEMENT									
Identifies role responsibilities for managing materials in unit/department									
Identifies mechanism to obtain supply from warehouse									
Demonstrates awareness of patient charge sheets and items to be charged									
F. ENVIRONMENT MANAGEMENT									
Maintains patient rooms and unit environment in a neat/orderly fashion									
Assists patient transfer from room to room									
Sets up patient room to prepare for admission/transfer for specific patient populations									
Breaks down patient room after discharge/transfer									
Distributes linen and disposes of dirty linen appropriately									
Identifies and reports environmental problems/concerns appropriately									
Identifiys location of chemotherapy spill kit (MS5 and ONC 6)									
CAPD Warmer (Med 4 and MS 5)									
Traction Set up for bed									
CPM (S7 and MS 5)									
Performs unit designated activities as directed									
G. CLINICAL SKILLS									
1	VITAL SIGNS – Competency reviewed and validated in Central Orientation								
2	WEIGHTS:								
	Demonstrates procedure for measuring patient weights via:								
	<ul style="list-style-type: none"> Standing scale 								
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	<ul style="list-style-type: none"> Patient lift (Arjo Tempo/sling) Bed scale 						
	Demonstrates appropriate documentation of weights						
	BED-MAKING:						
3	Demonstrates proper procedure for making an occupied bed						
	Demonstrates proper procedure for making an unoccupied bed						
	PATIENT DEATH:						
	Demonstrates procedure for post-mortem care						
	Discusses the procedure to be followed for admitting a body to the morgue						
4	Identifies the necessary paperwork for admission to the morgue						
	Demonstrates how to sign a body into the morgue log						
	Demonstrates putting a body into the morgue locker						
	Demonstrates how to use the body lift using proper body mechanics						
	Identifies where a body that is greater than 300 pounds is placed						
5	BATHING / PERSONAL CARE:						
	Performs / assists with patient bed bath						
	Performs / assists with patient shower						
	Demonstrates proper use of shower chair						
	Performs mouth care						
	Performs or assists with providing care of dentures						
	Shaves patients						
	Shampoos patient hair						
	Demonstrates proper procedure for back rub						

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Male / female perineal care – competency validated in central orientation									
Performs foley catheter care – competency validated in central orientation									
Applies skin protective products / ointments as directed									
Reports to nurse any skin changes observed during personal care									
Reports to nurse any changes in mouth, tongue, gums, teeth									
Maintains patient dignity during any personal care									
Attends Radiation In-service and verbalizes precautions to be taken when caring for a radiation patient (S7)									
6	<u>TOILETING / ELIMINATION:</u>								
Assists patient with bowel and bladder management									
Demonstrates procedure for usage of:									
• Bedpan									
• Urinal									
• Bedside commode									
• Toilet top specimen collection									
Empties foley collection bag, bedpan, urinal, ostomy bag and records output on flowsheet									
Demonstrates proper procedure for catheter care and incontinence care									
Applies fecal pouch									
Applies condom/texas catheter (urine collection device)									
Applies ostomy pouch									
Obtains urine specimens according to protocol:									
• Routine urinalysis									
• Clean-catch C&S									
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	<ul style="list-style-type: none"> 24-Hour urine collection 							
	Obtains stool specimens according to protocol							
	Demonstrates proper procedure for racking urine after renal biopsy							
	Demonstrates proper procedure for straining urine for kidney stones							
	Documents bowel movements and urinary output on nursing flowsheet							
	Reports any changes in stool and/or urine to nurse							
	TUBES AND DRAINS:							
7	Measures and records output on flowsheet:							
	<ul style="list-style-type: none"> Nasogastric tube 							
	<ul style="list-style-type: none"> Jackson Pratt 							
	<ul style="list-style-type: none"> Hemovac 							
	DIETARY CARE:							
8	Identifies and differentiates various diet orders and supplemental feedings							
	Sets up meal trays							
	Demonstrates correct positioning for feeding a patient							
	Verbalizes understanding of Aspiration Precautions							
	Demonstrates feeding a patient							
	Maintains calorie count and documents amount on appropriate form							
	Estimates percentage of meal eaten and records on flowsheet							
	Monitors patient oral fluid intake and records intake on flowsheet							
	Provides fresh drinking water and/or nourishment after confirming with nurse							
	SKIN CARE:							
9	Identifies risk factors, prevention strategies and management of abnormal							

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	skin conditions and pressure ulcers						
	Reports abnormal skin conditions to nurse						
	Demonstrates use of VersaCare bed						
	Demonstrates use of ZONEAIR/Advanta bed						
	Demonstrates use of common rental beds (Kinair, Bariatric)						
	Demonstrates correct set-up of over-bed trapeze						
	Demonstrates correct set-up of cooling / heating units as delegated						
	TWELVE (12) LEAD EKG: (excluding psychiatry)						
10	Identifies and completes EKG Forms/Requisitions						
	Demonstrates proper lead placement						
	Enters patient data appropriately into EKG machine						
	Obtains reading and EKG tracing						
	PATIENT SAFETY:						
11	Ensures side rails are up (≤ 3; 4 side rails = restraint)						
	Ensures nurse call bell is within patient reach						
	Ensures patient ID band is on						
	Maintains fall risk protocol (ensures yellow fall risk identification wrist band is on and the yellow magnet is placed on the patient door frame, if applicable)						
	Answers patient call light promptly						
	Utilizes restraints per policy						
	Utilizes bed and/or chair alarms, as appropriate						
	Maintains seizure precautions, as appropriate						
12	RESTRAINTS:						

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16	<u>RESPIRATORY CARE:</u>							
	Assists patient to turn / cough / deep breathe							
	Applies nasal cannula							
	Applies face mask							
	Recognizes and reports signs and symptoms of respiratory distress							
	Assists patient with incentive spirometry							
	Converts oxygen from wall set-up to portable tank, and back							
	Performs oral suctioning with yankauer catheter							
	Collects sputum specimens according to protocols							

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