

INITIAL UMG/JDH AMBULATORY COMPETENCY CHECKLIST

Position Title: Medical Assistant

Department: Obstetrics/Gynecology

Employee Name:

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	Method of Instruction (Use Instruction Key on Left)	Evaluation Summary			Evaluation Method (Use Evaluation Key on Left)	Comments
			Competent	Initials	Date		
			Yes	No			

I. ORIENTATION							
Presented at Ambulatory Services Orientation: E-mail; Internet							
Presented at Ambulatory Services Orientation: Performance Evaluation Process							
Presented at Ambulatory Services Orientation: Electronic version of Ambulatory Service Manual & Health Administration Manual							
Locates:							
Safety Manual							
Infection Control Manual							
Decentralized Lab Manual							
Lab Procedure Manual							
Drug Sample Log Book							
UMG Practice Manual-binder and electronic version							
Understands vacation/time off request protocol for unit							
Locates keys to unit supplies							
See Unit Specific Page							
II. SAFETY/INFECTION CONTROL							
Protocol presented at Health Center Clinical Orientation							
Locates emergency equipment							
Demonstrates ability to activate codes							
Disposes of needles/sharps/catheters in designated containers per protocol							
Demonstrates appropriate use/disposal of red bag waste							
Cleans/disinfects patient care equipment per approved infection control policies							

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Maintains clean, organized, and safe environment							
Promotes culture of safety; identifies and documents concerns using safety reporting.							
Locates link to Patient Safety Net							
Participates in routine checking of emergency cart supplies and equipment, and orders replacement supplies as needed.							
Locates fire extinguishers							
Locates fire alarm pull boxes on unit							
See Unit Specific Page							
<b>III. EQUIPMENT</b>							
Operates the following equipment according to protocol:							
Computer							
Copy Machine							
Fax Machine							
Expeditor Call System							
Telephone/beeper system							
Scale							
Blood Pressure Cuff							
Wheelchair/Stretchers							
EKG Machine							
Autoclave							
Patient Lift System							
Works with Clinical Engineering for equipment checks/repair							
Monitors medication refrigerator/freezer temperature per protocol							
See Unit Specific Page							

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IV. DOCUMENTATION/COMMUNICATION							
Presented at Ambulatory Services/UMG Orientation: Phone Etiquette							
Answers phones according to protocol							
Completes e-triage messages							
Reviews schedules for patient appointments							
Reviews minutes from staff meetings							
Demonstrates ability to use electronic correspondence/forms software							
Accesses patient information in LCR and EMR							
Accesses courier services as necessary							
Demonstrates ability to order necessary forms per protocol							
Coordinates release of Medical Record information per protocol							
Provides factual information to patient or patient designee ensuring HIPAA compliance							
Completes appropriate documentation in accordance with UCHC standards							
Maintains patient confidentiality and disposes of documentation containing patient information appropriately							
Prepares requisitions and forms for diagnostic testing accurately and correctly.							
See Unit Specific Page							
V. PERFORMANCE IMPROVEMENT							
Participates in unit performance improvement activities							
Shows commitment to learning new knowledge and skills to enhance service to customer/patients and achieve							

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organizational goals							
See Unit Specific Page							
<b>VI. DECENTRALIZED LAB</b>							
Performs quality control checks per protocol							
See Unit Specific Page							
<b>VII. PROVISION OF CARE</b>							
Performs routine procedures i.e. vital signs in accordance with protocols and reports deviations to provider or RN							
Performs clinical procedures as delegated and in accordance with UCHC standard and scope of practice							
Performs decentralized labs as specified by protocol							
Reviews pre-printed patient instruction sheets with patient and puts patient at ease							
Prepares rooms and work areas including stocking of rooms and carts with appropriate equipment and materials							
Performs provider orders in a timely, efficient manner							
Inventories and orders supplies and equipment							
Schedules and prioritizes workflow; manages multiple priorities							
Assures privacy and dignity of patients during care							
Assists physician with procedures as needed							
Use of pain scale in assessing pain							
Phlebotomy							
Prepares and draws up injectable medication(s) for Provider administration, per approved policy and procedure, using sterile technique							
Laboratory specimen labeling and packaging							

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Obtains prior authorization for patient prescriptions as required							
Complies with UMG policy and procedure for Prescription Refill Authorization							
See Unit Specific Page							
<b>VIII. AGE SPECIFIC</b>							
Age Specific presentation presented at Health Center Clinical Orientation							
Communicates information to patients and family in language that is clearly understood.							
See Unit Specific Page							
<b>IX. CUSTOMER SERVICE</b>							
Presented at Ambulatory Services Orientation: Customer Service Skills							
Committed to determining and exceeding patient/customer needs and promotes UCHC service standards							
Takes responsibility for job by reporting to work on time and considering the needs of the unity when requesting time off							
Recognizes how actions will affect others and uses problem solving skills and creativity to address identified opportunities							
<b>X. CLERICAL SKILLS</b>							
Presented at Ambulatory Services orientation: Patient flow describing duties of Clerk, COA, PSR, Provider							
Answers phone and performs clerical functions and responsibilities as appropriate and per protocol							
Performs basic first line telephone triage including assistance with prescription refills							

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Competency Checklist Updated: 9/05, 7/07, 1/08, 4/08

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Utilizes telephone/beeper system per protocol							
Demonstrates the process of disposing printed materials which contain patient information							
Schedules appointments according to protocol							
Identifies the number for IT call center (x4400)							
Routes vouchers in an efficient manner							
See Unit Specific Page							
<b>XI. FISCAL RESPONSIBILITY</b>							
Participates in unit activities aimed at evaluation/improving fiscal outcomes of care							
Complies with unit policies regarding patient charges, supplies, etc.							
Completes ABN validation for Medicare Part A&B patients							
Use of proper CPT and ICD9 codes when submitting requisitions and vouchers.							
See Unit Specific Page							
<b>XII. IDX SCHEDULING &amp; REGISTRATION SYSTEM AND CLINICAL INFORMATION SYSTEMS</b>							
Presented at Ambulatory Services/UMG Orientation: Access to IDX							
Presented at Ambulatory Services/UMG Orientation: Access to LCR Systems, Caremedic, EMR, e-triage							
Presented at Clinical Systems Training Part 1: IDX Scheduling System:							
Demonstrates ability to locate patient in database							

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Demonstrates knowledge of basic selections of ADT, BAR							
Performed mini- registration of new patient							
Performed scheduling & canceling of appointment							
Performed linking of appointment for deaf interpreter							
Presented at Ambulatory Services/UMG Orientation: LCR System							
See Unit Specific Page							
<b>XIII. EDUCATION</b>							
Presented at Ambulatory Services/UMG Orientation: Ability to access HealthStream Education System							
Completes required yearly education courses as noted in HealthStream system							
Safety							
IC							
CPR							
Code Blue							
Laboratory							
Age Specific							
Unit Specific							
Corporate Compliance							
HIPAA							
Attends job related in-services throughout the year							
See Unit Specific Page							

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UNIT SPECIFIC CHECKLIST:							
<b>II. SAFETY/INFECTON CONTROL</b>							
Cidex OPA effectiveness/concentration monitoring							
<b>III. EQUIPMENT</b>							
Ultrasound machine							
Glucometer							
Clinitek 50 Urine Chemistry Analyzer							
Colposcope							
LEEP machine(s)							
Fetal monitor(s) with pulse oximeter							
"GUS" (Gluteraldehyde Ultrasound Station) machine							
<b>VI. DECENTRALIZED LAB</b>							
Urine dipstick testing							
Urine pregnancy testing							
Hemocult processing							
Fingerstick blood glucose testing							
pH testing							
<b>VII. PROVISION OF CARE</b>							
Chart checking and chart preparation							
Set up and Assist:							
Colposcopy							
Cryotherapy							
Endometrial biopsy							
LEEP procedure							

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Sonohysterogram							
IUD insertion							
Skin biopsy							
Incision and Drainage							
<b>X. CLERICAL SKILLS</b>							
Assemble visit specific laboratory packets							
Assemble pre-natal visit folders							
<b>XII. IDX SCHEDULING &amp; REGISTRATION SYSTEM AND CLINICAL INFORMATION SYSTEMS</b>							
Quest Care 360							