

Student's Name \_\_\_\_\_

**MEDICAL ASSISTANT: ADMINISTRATIVE AND CLINICAL POSTSECONDARY LEVEL**

**Directions:** Evaluate the trainee using the rating scale below and check the appropriate number to indicate the degree of competency achieved. The numerical ratings of 3, 2, 1, and 0 are not intended to represent the traditional school grading system of A, B, C, D, and F. The descriptions associated with each of the numbers focus on level of student performance for each of the tasks listed below.

**Rating Scale:**

- 0 - No Exposure** - no information nor practice provided during training program, complete training required.
- 1 - Exposure Only** - general information provided with no practice time, close supervision needed and additional training required.
- 2 - Moderately Skilled** - has performed independently during training program, limited additional training may be required.
- 3 - Skilled** - can perform independently with no additional training.

1. Number of Competencies Evaluated \_\_\_\_\_

2. Number of Competencies Rated 2 or 3 \_\_\_\_\_

3. Percent of Competencies Attained (2/1) \_\_\_\_\_

\_\_\_\_\_

Grade \_\_\_\_\_

\_\_\_\_\_

Instructor Signature \_\_\_\_\_ Date \_\_\_\_\_

**MEDICAL ASSISTANT: ADMINISTRATIVE**

**01.0 Describe components of the health care industry and the role of the medical assistant.**

The student will be able to:

- 0 1 2 3  
 01.01 Describe the major components of the health care industry and the role of the medical assistant.
- 01.02 Describe the role and responsibilities of the medical assistant as part of a health care team.

**02.0 Demonstrate employability skills and habits.**

The student will be able to:

- 0 1 2 3  
 02.01 Identify employment opportunities.
- 02.02 Apply employment seeking skills.
- 02.03 Interpret employment capabilities.
- 02.04 Demonstrate appropriate work behavior.
- 02.05 Maintain a safe and healthy environment.
- 02.06 Maintain a business-like image.
- 02.07 Adapt to change.
- 02.08 Demonstrate a knowledge of business/laws/principles.
- 02.09 Communicate effectively on the job.
- 02.10 Develop appropriate grooming habits.
- 02.11 Apply effective interpersonal/human relation skills.

**03.0 Display professionalism.**

The student will be able to:

- 0 1 2 3  
 03.01 Project a positive attitude.
- 03.02 Perform within ethical boundaries.
- 03.03 Practice within the scope of education, training and personal capabilities.
- 03.04 Maintain confidentiality.
- 03.05 Work as a team member.
- 03.06 Conduct oneself in a courteous and diplomatic manner.
- 03.07 Show initiative and responsibility.
- 03.08 Promote the profession.

**04.0 Demonstrate effective communication skills.**

The student will be able to:

- 0 1 2 3  
 04.01 Listen and observe.
- 04.02 Apply confidentiality in all communications.
- 04.03 Apply empathy and impartiality with all customers.
- 04.04 Adapt communications according to customer needs.
- 04.05 Recognize and respond to verbal and non-verbal communications.
- 04.06 Receive, organize, prioritize and transmit information.
- 04.07 Follow oral and written instructions.
- 04.08 Prepare, outline and deliver short oral presentations.

0 1 2 3

- 04.09 Prepare visual material for an oral presentation.
- 04.10 Compose written communication using correct grammar, spelling, and format.
- 04.11 Participate in group discussion as a member and leader.
- 04.12 Obtain appropriate information from graphics, maps or signs.
- 04.13 Locate and record information retrieved from written resources.
- 04.14 Annotate letters, reports, and/or news articles.
- 04.15 Define terms associated with communications.
- 04.16 Use medical terminology and abbreviations correctly in verbalization and documentation.
- 04.17 Communicate using intercom devices.
- 04.18 Use proper telephone techniques and etiquette.
- 04.19 Transcribe dictation.
- 04.20 Process in-coming and out-going mail.
- 04.21 Operate copying machines.
- 04.22 Prepare correspondence.
- 04.23 Prepare packages for shipping.
- 04.24 Edit written materials.
- 04.25 Evaluate all forms of communication.

**05.0 Perform administrative duties.**

The student will be able to:

0 1 2 3

- 05.01 Record/schedule office appointments.
- 05.02 Arrange conferences.
- 05.03 Make travel plans for personnel.
- 05.04 Maintain physicians' on-call schedule.
- 05.05 Schedule medical staff appointments and activities.
- 05.06 Schedule hospital and other outside agency appointments for patients.
- 05.07 Prepare and maintain medical records.
- 05.08 Apply computer concepts for office procedures.
- 05.09 Locate resources and information for patients and employers.

**06.0 Provide patient services.**

The student will be able to:

0 1 2 3

- 06.01 Provide processing service for patients.
- 06.02 Provide processing service for visitors.
- 06.03 Assist patient with registration forms.

0 1 2 3

- 06.04 Complete admission forms.
- 06.05 Complete discharge forms.
- 06.06 Complete insurance forms.
- 06.07 Compile patient abstracts for insurance inquiries.
- 06.08 Meet and greet patients.
- 06.09 Obtain emergency medical assistance when needed.
- 06.10 Arrange for extended patient services.
- 06.11 Refer patients to community agencies as needed.

**07.0 Complete records processing.**

The student will be able to:

0 1 2 3

- 07.01 Compile daily patient census.
- 07.02 Prepare and maintain current patient data.
- 07.03 Complete legal document procedures.
- 07.04 Complete personnel insurance records.
- 07.05 Input data into automated system.
- 07.06 Complete incident reports.

**08.0 Complete filing procedures.**

The student will be able to:

0 1 2 3

- 08.01 Establish cross-reference index.
- 08.02 Maintain filing system alphabetically and numerically.
- 08.03 Maintain tickler file.
- 08.04 Retrieve filed material.
- 08.05 Maintain classified files.
- 08.06 Update health care records.
- 08.07 Maintain alphabetical, numerical, terminal digit, and subject filing system.
- 08.08 Maintain manual/automated disease indexes.
- 08.09 Maintain manual/automated surgical operations indexes.
- 08.10 Maintain physical/confidential security of health care records.

**9.0 Manage accounts receivable.**

The student will be able to:

0 1 2 3

- 09.01 Collect fee for service.
- 09.02 Balance day sheet.
- 09.03 Bill patient for services.

0 1 2 3

- 09.04 Age and process past due accounts.
- 09.05 Make bank deposits.
- 09.06 Open new patient accounts.
- 09.07 Reconcile bank statements.
- 09.087 Use current third party guidelines for reimbursements.

**10.0 Perform accounting services.**

The student will be able to:

0 1 2 3

- 10.01 Process accounts payable invoice.
- 10.02 Make journal entries.
- 10.03 Reconcile journal.
- 10.04 Complete balance sheet.
- 10.05 Compile summary statement.
- 10.06 Post entries from journals to ledgers.
- 10.07 Maintain petty cash fund.
- 10.08 Process employee payroll.
- 10.09 Input financial data in automated system.

**11.0 Provide data entry operations.**

The student will be able to:

0 1 2 3

- 11.01 Input data for agendas.
- 11.02 Transcribe minutes of meetings.
- 11.03 Input data for financial statements.
- 11.04 Input data from recorded media.
- 11.05 Input data for a letter.
- 11.06 Prepare statistical reports.
- 11.07 Input data for a medical report.
- 11.08 Maintain office equipment.
- 11.09 Compose copy to be imputed.

**12.0 Maintain health care records.**

The student will be able to:

0 1 2 3

- 12.01 Transcribe reports for medical records.
- 12.02 Code diagnoses and procedures.
- 12.03 Transfer codings from clinical records and abstracts.
- 12.04 Enter information into automated system.
- 12.05 Retrieve information from automated system.
- 12.06 Prepare medical record for microfilming.

0 1 2 3

- 12.07 Close patient records.
- 12.08 Maintain medical records.

**13.0 Apply legal concepts to practice.**

The student will be able to:

0 1 2 3

- 13.01 Document accurately.
- 13.02 Determine needs for documentation and reporting.
- 13.03 Use appropriate guidelines when releasing records or information.
- 13.04 Follow established policy in initiating or terminating medical treatment.
- 13.05 Dispose of controlled substances in compliance with government regulations.
- 13.06 Maintain licenses and accreditation.
- 13.07 Monitor legislation related to current health care issues and practice.

**14.0 Manage the office.**

The student will be able to:

0 1 2 3

- 14.01 Operate and maintain facilities and equipment.
- 14.02 Evaluate and recommend equipment and supplies for a practice.
- 14.03 Maintain liability coverage.
- 14.04 Exercise efficient time management.
- 14.05 Develop policy/procedures manual.
- 14.06 Schedule custodial or maintenance services.

**15.0 Maintain inventory.**

The student will be able to:

0 1 2 3

- 15.01 Inventory supplies and equipment.
- 15.02 Requisition supplies and equipment.
- 15.03 Order supplies and equipment.
- 15.04 Receive supplies and equipment.
- 15.05 Store supplies and equipment.

**16.0 Supervise and train employees.**

The student will be able to:

0 1 2 3

- 16.01 Orient and train employees.
- 16.02 Demonstrate use of equipment.
- 16.03 Conduct on the job training for employees.
- 16.04 Develop personnel continuing education opportunities.
- 16.05 Evaluate job performance.

0 1 2 3

- 18.11 Identify options for solving personnel problems.
- 18.12 Choose appropriate action in solving problems involving violation of business principles.
- 18.13 Demonstrate appropriate office behavior.
- 18.14 Select items for new employee orientation.
- 18.15 Apply critical decision making/problem solving skills.

**17.0 Perform math computations both manually and electronically.**

The student will be able to:

0 1 2 3

- 17.01 Solve addition, subtraction, multiplication and division problems, whole numbers and fractions.
- 17.02 Solve problems involving percentages and discounts.
- 17.03 Solve problems involving comparisons.
- 17.04 Interpret charts, graphs, and tables.
- 17.05 Solve finance charge and annual percentage rate problems.
- 17.06 Determine whether sufficient, insufficient, or extraneous information is given for solving a problem.
- 17.07 Solve problems involving length, width, or height.
- 17.08 Solve problems using metric units.
- 17.09 Read and verify the totals on a print-out.
- 17.10 Solve problems using proportions and ratios.
- 17.11 Solve problems using systems of measurement and conversions.

**18.0 Perform decision making activities.**

The student will be able to:

0 1 2 3

- 18.01 List the steps in problem solving.
- 18.02 Determine the proper priority of work.
- 18.03 Prepare a day's schedule for an employer.
- 18.04 Choose appropriate actions in application of business ethics.
- 18.05 Choose appropriate actions in following a chain of command.
- 18.06 Choose appropriate actions for effective time management.
- 18.07 Select and delegate tasks; identify ways to assign work.
- 18.08 Determine preventive actions for communication problems.
- 18.09 Select the best ways to handle confidential information.
- 18.10 Use constructive feedback to correct improper behavior.

**MEDICAL ASSISTANT: CLINICAL POSTSECONDARY LEVEL**

**01.0 Apply principles of health, safety, and infection control.**

The student will be able to:

- 0 1 2 3  
 01.01 Perform handwashing techniques.  
 01.02 Perform sanitizing, sterilizing, and disinfecting techniques.  
 01.03 Perform universal precautions.  
 01.04 Establish and maintain a sterile field.  
 01.05 Comply with current Occupational Safety and Health Administration Guidelines (OSHA).  
 01.06 Comply with Clinical Laboratory Improvement Act (CLIA).

**02.0 Prepare treatment areas.**

The student will be able to:

- 0 1 2 3  
 02.01 Prepare room for specific examinations.  
 02.02 Prepare rooms for specific treatments.  
 02.03 Assure safety of the facility and all equipment.  
 02.04 Restock supplies.

**03.0 Assist physician with physical examinations and treatments.**

The student will be able to:

- 0 1 2 3  
 03.01 Assist patient to treatment room.  
 03.02 Prepare, position, and drape patients.  
 03.03 Assist physician during the examination and treatment.  
 03.04 Instruct patients according to physician's orders.  
 03.05 Assist patient in leaving the examining room.

**04.0 Collect patient information and assessment data.**

The student will be able to:

- 0 1 2 3  
 04.01 Complete patient's health history form.  
 04.02 Measure vital signs.  
 04.03 Measure heights and weights.  
 04.04 Measure growth signs of children (chest and head).  
 04.05 Record assessment data.

**05.0 Collect and prepare specimens.**

The student will be able to:

- 0 1 2 3  
 05.01 Collect blood samples.

- 0 1 2 3  
 05.02 Collect urine specimens.  
 05.03 Collect sputum specimens.  
 05.04 Collect stool specimens.  
 05.05 Collect bacterial smears and cultures.  
 05.06 Collect specimen for PKU.  
 05.07 Prepare specimens for examination and shipment.

**06.0 Perform laboratory procedures (within CLIA guidelines for each state).**

The student will be able to:

- 0 1 2 3  
 06.01 Operate a microscope.  
 06.02 Perform capillary blood procedure.  
 06.03 Perform skin punctures.  
 06.04 Perform blood glucose screening.  
 06.05 Perform hemoglobin and hematocrit procedures.  
 06.06 Perform Glucose Tolerance Test (GTT).  
 06.07 Perform Complete Blood Count (CBC), Differential and Platelet Count.  
 06.08 Perform venipuncture procedures for blood tests.  
 06.09 Prepare a blood smear.  
 06.10 Perform pregnancy tests.  
 06.11 Perform urine tests.  
 06.12 Prepare bacterial smears and cultures.  
 06.13 Prepare a gram stain.  
 06.14 Perform Hemocult Test.  
 06.15 Perform agglutination testing.  
 06.16 Perform sedimentation rate.

**07.0 Perform diagnostic tests and procedures.**

The student will be able to:

- 0 1 2 3  
 07.01 Perform scratch, patch and intradermal skin tests.  
 07.02 Perform routine 12-lead ECG (EKG).  
 07.03 Perform Vision testing.

**08.0 Assist with minor surgical procedures.**

The student will be able to:

- 0 1 2 3  
 08.01 Prepare treatment room and minor surgical setup.  
 08.02 Prepare and drape surgical site.

0 1 2 3

- 08.03 Donn surgical gown and gloves.
- 08.04 Assist with minor surgical procedures.
- 08.05 Remove sutures.
- 08.06 Gown and glove physician.
- 08.07 Maintain sterile field.
- 08.08 Assist patient from surgical site.
- 08.09 Clean and restore surgical site.

**09.0 Assist with administration of medications.**

The student will be able to:

0 1 2 3

- 09.01 Use PDR and other references.
- 09.02 Write a prescription ordered by a physician.
- 09.03 Call a prescription to a pharmacist by phone.
- 09.04 Record medications on a health care chart.
- 09.05 Instruct a patient regarding medication use.
- 09.06 Obtain and administer oral medications.
- 09.07 Administer topical medications.
- 09.08 Administer suppositories.
- 09.09 Administer inhalants.
- 09.10 Administer immunizations.
- 09.11 Administer injections.

**10.0 Provide patient instruction.**

The student will be able to:

0 1 2 3

- 10.01 Provide instruction for physical examinations and treatments.
- 10.02 Provide instruction for specimen collections.
- 10.03 Provide instruction for diagnostic tests and procedures.
- 10.04 Provide instruction for medications and their side effects.
- 10.05 Provide instruction for maintaining health and wellness and prevention of illness and accidents.
- 10.06 Provide instruction and demonstrate use of assistive devices.

**11.0 Perform emergency procedures.**

The student will be able to:

0 1 2 3

- 11.01 Assemble and maintain an emergency tray of drugs and equipment.
- 11.02 Perform first aid procedures for illness and injuries.
- 11.03 Perform CPR.
- 11.04 Assist in assessment and triage of patients with emergencies.