

Competency Checklist – Medical Assistants

Employee Name:	Eval Period		Date:	
Supervisor:				
MA certification or ABR-OE	Yes	No		
Patient Relations	Reviewed	Observed	Performed	Initials
Prompt, courteous, and helpful (ex. good morning, evening, how may I help you?)				
Verifies patient name and date of birth				
Vital Signs	Reviewed	Observed		
Infant/Toddler				
Growth charts				
Head circ.				
Length				
Pulse				
Pulse ox				
Respirations				
Temperature - <input type="checkbox"/> Temporal <input type="checkbox"/> Rectal <input type="checkbox"/> Axillary <input type="checkbox"/> Oral				
Weight				
Children (ages 3 – 18)				
B/P				
Growth charts				
Height				
Pulse				
Pulse ox				
Respirations				
Temperature - <input type="checkbox"/> Temporal <input type="checkbox"/> Rectal <input type="checkbox"/> Axillary <input type="checkbox"/> Oral				
Weight				
Adults				
B/P				
Height				
Orthostatic blood pressures				
Pulse				
Pulse ox				
Respirations				
Temperature - <input type="checkbox"/> Temporal <input type="checkbox"/> Rectal <input type="checkbox"/> Axillary <input type="checkbox"/> Oral				
Weight				
Injections	Reviewed	Observed	Date	Initials
Appropriate follow-up for out of range refrigerators/freezers				
Documenting in IMMPACT				
IMMPACT log-in				
Immunization dose for age				
Immunization schedule				
Immunization storage policy				
Labeling syringes prior to admin				
VIS (Vaccination Info Sheet)				

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Infant / Toddler				
ID				
IM				
SC				
Children (ages 3 – 18)				
ID				
IM				
SC				
Adult				
ID				
IM				
SC				
Procedures	Reviewed	Observed	Date	Initials
Allergy injection				
Application of oxygen (NC, NRB, BVM)				
Autoclave				
Diabetic foot exam – visual, monofilament, pulses				
Ear lavage				
EKG				
Eye exam chart (Snellen)				
Hearing				
Instrument cleaning & packaging				
Irrigation of wounds				
Knows how to check for allergy shot reaction				
Log allergy serum use				
Medication administration				
Nasopharyngeal swab				
Nebulizer				
Nebulizer teaching				
NP swab				
Oximetry				
Peak flows				
PFT pre/post				
PFT privileges				
Pill box refills				
Pill counts (random)				
Spacer teaching				
Splinting & ACE wrap				
Sterile field				
Sterile gloving				
Stool collection instruction				
Throat swab				
Time-out procedure				
Tympanograms				
Urine bag				

Competency Checklist – Medical Assistants

Urine catheterization				
Vision				
Wound care				
Laboratory Specimen Collection and Order Process	Reviewed	Observed	Date	Initials
Blood cultures (technique/procedure)				
Butterfly draw				
Capillary stick				
Heel stick				
In-house vs. send out labs				
Knows which tubes to use for the desired test				
LABDAQ				
Labeling tubes in presence of patient proper labeling				
STAT results				
Urine collection – clean catch				
Urine drug screen collections				
Use of centrifuge				
Vacutainer draw				
Venous draws				
Verbalizes understanding of Clinical 118 – Bloodborne Exposure Control Plan				
Procedure Set-Ups	Reviewed	Observed	Date	Initials
Assisting during procedures				
Basic surgery set-up				
Burn kit				
Dressing kit				
Eye kit				
Knows instruments by name and function				
Laceration repair				
Lesion removal				
Nail removal				
Pap				
Logician	Reviewed	Observed	Date	Initials
Can create flags				
Can sign-off on a document				
Documentation of labs drawn, medications, immunizations				
Documenting a phone note				
E-prescribing				
Flow-sheeting				
Logging off when leaving computer/privacy				
Make and cancel appointments				
Managing the desktop / using “Out of Office”				
Pop-ups				
Closing orders				
Refilling medications				
Specialty-Specific forms				

Competency Checklist – Medical Assistants

Office Maintenance	Reviewed	Observed	Date	Initials
Calibrate scales				
Check emergency kit				
Check eye wash stations				
Check fire extinguishers monthly				
Check O2 and CO2 tanks and order weekly				
Maintain medication closet – organize and discard expired meds				
Maintain MSDS sheets				
Oxygen checks/logs				
Panic buttons				
Restock and check dates on VIS sheets				
Stocking/re-stocking rooms				
Miscellaneous Objectives	Reviewed	Observed	Date	Initials
Abbreviation do not use list				
Access and communication policy				
Add to email distribution list(s)				
Barriers to learning				
Calling for reports at facilities				
Chaperone				
Checking email daily				
Checking/reconciling QC logs daily				
Chief complaint				
Critical results policy				
Daily narcotic/controlled substance count				
Depo calendar, procedure if out of range				
Diabetes Standing Order Protocol				
Difficulty with reading/completing forms				
Door alarm instructions (activating and inactivating)				
DOT physical forms				
EMHIE paperwork				
Emergency contact				
HealthInfo Net (password)				
HealthInfo Net (training on use)				
How to pull a PMP				
Infection control section				
Informing patients of results				
Language line				
Location of general office supplies				
Location of supplies to stock exam rooms				
Mail order pharmacies				
Maine Breast and Cervical Health Program				
Maintains work area in a neat and orderly manner				
Method of education				
Notifying of Lyme Disease results				
Ordering office/clinical supplies				
Participates in meetings and committees as assigned				

Competency Checklist – Medical Assistants

Patient portal				
Permissions for EKG				
Permissions for PFT				
PHQ-2				
PMP login				
Pre-visit planning				
Prior authorizations/calling insurance companies				
Proper hand hygiene				
Proper wipe down of exam tables/contact time				
Reviews policy and procedure manuals				
Rx assist program				
Screens and responds to routine requests for information				
Standing orders/protocols – flu shots				
Standing orders/protocols – UA for abdominal pain				
Thermometer calibration/how to reset vaccine refrigerator				
Thermometers				
Use of BAT phone				
Use of stoplight reports				
Wearing ID badge				
Room Patient	Reviewed	Observed	Date	Initials
ASQ screens				
MCHAT				
Passive smoke exposure				
Smoking cessation counseling – 90%				
Smoking status – 95%				
Update allergy list – 95%				
Update medication list (add/delete/modify) – 95%				
Update problem list				
Use of masks for ILI				
Verify patient identity				
View all protocol button – 90%				
Vital signs (BP, BMI, growth charts, height, weight) – 95%				
Room Maintenance	Reviewed	Observed	Date	Initials
Biohazard waste (proper items)				
Checking for expiration date of supplies				
Sharps containers (< ¾ full)				
Telephone System	Reviewed	Observed	Date	Initials
Can place a call on hold				
Can retrieve voice mail messages				
Transfer calls appropriately-informing patients of voice mail coverage				
Triage patient phone calls				
Use of fax machine				
E-Mail System	Reviewed	Observed	Date	Initials
Can and consistently uses out of office message when away from the office				

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Contacts Supervisor for issues with IT Help Desk				
Delivers/forwards/completes message to appropriate person (who handles credentialing, who handles application process, etc. within HR)				
E-mail signature is up-to-date and has appropriate contact information				
Knows how to access and find information within the Outlook Public Folders				
Safety (Area Specific)	Reviewed	Observed	Date	Initials
Alarm System – setting and disarming, knows how to use panic buttons				
Defib – location and use				
Disposal of bio-hazardous waste				
Emergency exits				
Emergency kit (documentation/log)				
Emergency phone numbers: fire/rescue, police dept., poison control, etc.				
Ergonomic evaluation done				
Evacuation procedures				
Fire extinguisher – location and use				
Hand washing procedures based on infection control procedures				
Knowledge of aseptic technique and infection control				
Location and use of eye wash				
MSDS Sheets – location and use				
PPE – can identify correct use of PPE and where it is located				
Workplace injury protocol				
Pharmacy	Reviewed	Observed	Date	Initials
Administration of buccal midazolam				
Administration of nasal naloxone				
Review of emergency drug box				

LAB TESTS

Lab Tests Waived Test Competency is assessed using at least two methods for each test performed:	Observed	Blind Specimen	Written Test	Review QC
Glucose <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency		N/A		
Hemoglobin <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				
HIV <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Mono <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Occult Blood <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A

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Lab Tests Waived Test Competency is assessed using at least two methods for each test performed:	Observed	Blind Specimen	Written Test	Review QC
PT/INR <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency		N/A		N/A
Rapid Strep <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Urine Dipstick (Clinitek or Visual) <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Urine Drug Screen <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Urine Pregnancy <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
A1C <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
Urine Buprenorphine Screen <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
IFOB <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A
ESR Westergren Method <input type="checkbox"/> Initial Training <input type="checkbox"/> Yearly Competency				N/A

Comments:

Employee Signature

_____/_____/_____
Date

Supervisor Signature

_____/_____/_____
Date