

# **Educational Competencies for Medical Assistants**

**For CAAHEP Accredited Medical Assisting  
Educational Programs**

**Based on 2015 Standards**

**MEDICAL ASSISTING  
EDUCATION REVIEW BOARD  
2015**

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## Introduction

The *Educational Competencies for the Medical Assistant* (ECMA) can be used in a variety of ways by the educators who teach within CAAHEP-accredited medical assisting programs. MAERB's goal in producing the ECMA is to provide suggested evaluations for meeting each of the entry-level psychomotor and affective competencies in the 2015 MAERB Core Curriculum which can be found in Appendix B of the 2015 *Standards and Guidelines*.

For the majority of psychomotor and affective competencies, there are brief synopses of possible evaluations designed to have students perform and be assessed on those competencies. Instructors will need to develop the appropriate tool to demonstrate how students are being assessed and achievement is measured.

Many of the suggestions are based upon scenarios that either require discussion or role-playing or both. There is a great deal of possible variations that can occur within those suggested scenarios so creativity and ingenuity will certainly further develop those preliminary sketches

Several of the competencies have a number of evaluation options. It is definitely not required that all of them be used; rather they just indicate the range of options available to the educator.

There are a few competencies where there are no suggestions, simply because the competency itself provides the model for the assessment and achievement of the competency. You will simply see a notation that no suggestions are necessary.

Documentation of achievement of all competencies found in the psychomotor and affective domains must be evaluated in a manner consistent with the action verb.

As was outlined above, the MAERB produces this document to provide guidance. The ECMA has been a useful tool for the last several iterations of the MAERB Core Curriculum. In order to expand the dialogue, the MAERB is soliciting suggestions and samples from those who are teaching and working within CAAHEP-accredited medical assisting programs.

If you have some evaluations and assessment tools that you would like to share with the community of CAAHEP-accredited medical assisting programs, please email those materials to the following email address: [collaboration@maerb.org](mailto:collaboration@maerb.org). Those materials will be reviewed by the MAERB members, and, if deemed appropriate, they will be shared with the community of people working within CAAHEP-accredited medical assisting programs. When you submit a suggested evaluation, please clearly indicate the competency(ies) that it fulfills and share the method of assessing achievement for that competency (ies). By submitting a suggested evaluation and assessment, you are indicating that you are willing to share it with the community.

Please also let us know through the [collaboration@maerb.org](mailto:collaboration@maerb.org) mailbox any other curricular resources that you might find useful, so that MAERB can continue to support the implementation of the 2015 MAERB Core Curriculum.

## CONTENT AREA I: Anatomy & Physiology

Psychomotor	
<p>1.P.1 Measure and record:</p> <ol style="list-style-type: none"> <li>a. blood pressure</li> <li>b. temperature</li> <li>c. pulse</li> <li>d. respirations</li> <li>e. height</li> <li>f. weight</li> <li>g. length (infant)</li> <li>h. head circumference (infant)</li> <li>i. pulse oximetry</li> </ol>	<p><i>NOTE: Documentation for recording may include:</i></p> <ol style="list-style-type: none"> <li>1. Patient chart</li> <li>2. Skill sheet</li> <li>3. Flow Sheet</li> </ol> <p>A. Measure and document blood pressure using the following equipment:</p> <ol style="list-style-type: none"> <li>1. anaerobic blood pressure cuff</li> <li>2. digital blood pressure cuff</li> </ol> <p>B. Measure and document temperatures using the following equipment:</p> <ol style="list-style-type: none"> <li>1. Disposable thermometer</li> <li>2. Digital thermometer</li> <li>3. Tympanic thermometer</li> <li>4. Temporal thermometer</li> </ol> <p>C. Measure and document radial and apical pulse</p> <p>D. Measure and document respirations</p> <p>E. Measure and document height using appropriate scale</p> <p>F. Measure and document weight using appropriate scale:</p> <ol style="list-style-type: none"> <li>1. Balance scale</li> <li>2. Electronic scale</li> </ol> <p>G. Measure and document length using appropriate equipment:</p> <ol style="list-style-type: none"> <li>1. Infant meter (length board) or</li> <li>2. Measuring tape</li> </ol> <p>H. Measure and document head circumference using appropriate equipment</p> <p>I. Measure and document patient's O<sup>2</sup> saturation rate using the appropriate equipment</p>
<p>I.P.2. Perform:</p> <ol style="list-style-type: none"> <li>a. Electrocardiography</li> </ol>	<p>No suggestions needed for electrocardiograph.</p>

<ul style="list-style-type: none"> <li>b. Venipuncture</li> <li>c. Capillary puncture</li> <li>d. Pulmonary function testing</li> </ul>	<p><b>B. Venipuncture</b> Collect and document venous blood specimen using appropriate techniques</p> <ul style="list-style-type: none"> <li>1. Multi-draw method (vacutainer)</li> <li>2. Winged-infusion method</li> <li>3. Syringe method</li> </ul> <p><i>Methods may be used in conjunction with obtaining specimens for testing.</i></p> <p><b>C. Capillary puncture</b> Collect and document capillary blood specimen using appropriate techniques</p> <ul style="list-style-type: none"> <li>1. Finger stick</li> <li>2. Heel stick</li> </ul> <p><i>Method may be used in conjunction with obtaining specimens for testing.</i></p> <p><b>D. Pulmonary function testing</b> Measure and document lung function using appropriate equipment:</p> <ul style="list-style-type: none"> <li>1. Spirometry</li> <li>2. Inhalation challenge tests</li> <li>3. Peak flow meter</li> </ul>
<p>I.P.3 Perform patient screening using established protocols</p>	<p><b>A.</b> Using a provider approved step-by-step screening tool to question the patient and determine the next course of action (for example, appointment today, next available, report to hospital, call for emergency transport)</p> <p><b>B.</b> Screen patient for visual acuity</p> <p><b>C.</b> Screen patient for hearing acuity</p>
<p>I.P.4. Verify the rules of medication administration:</p> <ul style="list-style-type: none"> <li>a. Right patient</li> <li>b. Right medication</li> <li>c. Right dose</li> <li>d. Right route</li> <li>e. Right time</li> <li>f. Right documentation</li> </ul>	<p>No suggestions needed.</p>



I.P.5. Select proper sites for administering parenteral medications	<p>Using anatomical landmarks, locate sites on infants, children and adults for the following injections:</p> <ol style="list-style-type: none"> <li>1. intradermal</li> <li>2. subcutaneous</li> <li>3. intramuscular (deltoid, vastus lateralis, ventrogluteal, and dorsal gluteal)</li> </ol>
I.P.6. Administer oral medications	<p>Administer and document oral medication using the appropriate technique:</p> <ol style="list-style-type: none"> <li>1. Prepare and dispense solid and liquid medication</li> <li>2. Simulated sublingual medication</li> </ol>
I.P.7. Administer parenteral (excluding IV) medications	<p>Administer and document the following:</p> <ol style="list-style-type: none"> <li>1. intradermal injection</li> <li>2. subcutaneous injection</li> <li>3. intramuscular (deltoid, vastus lateralis, ventrogluteal, and dorsal gluteal) injections</li> <li>4. Z-track injection</li> </ol>
I.P.8. Instruct and prepare a patient for a procedure or a treatment	<p>A. Scenario: prepare a "patient" for a minor office procedure, such as removal of a lesion on the back. Explain to the patient the type of procedure, time needed for the procedure, and so on. Document that the patient has been instructed.</p> <p>B. Prepare an information sheet for a procedure manual that would be given to a patient prior to leaving the office when a procedure has been scheduled.</p>
I.P.9. Assist provider with a patient exam	<p>A. Properly position patient in the following manners:</p> <ol style="list-style-type: none"> <li>a. Supine</li> <li>b. Recumbent and dorsal recumbent</li> <li>c. Lithotomy</li> <li>d. Prone</li> <li>e. Sims</li> <li>f. Fowler's and Semi-Fowler's</li> <li>g. Trendelenberg</li> <li>h. Knee-chest</li> </ol> <p>B. Setting up the room appropriately for an exam (for example, gynecological and so on)</p>

<p>I.P.10. Perform a quality control measure</p>	<p>A. Calibrate and document appropriate equipment</p> <p>B. Measure and document the temperature of equipment</p> <p>C. Check expiration dates and storage instructions on all reagents and test kits</p> <p>D. Run appropriate quality control specimen on chemistry equipment, such as glucose or cholesterol testing equipment</p>
<p>I.P.11. Obtain specimens and perform the following:</p> <ol style="list-style-type: none"> <li>a. CLIA waived hematology test</li> <li>b. CLIA waived chemistry test</li> <li>c. CLIA waived urinalysis</li> <li>d. CLIA waived immunology test</li> <li>e. CLIA waived microbiology test</li> </ol>	<p>A. CLIA waived hematology test</p> <ol style="list-style-type: none"> <li>1. Perform and document the results of a spun microhematocrit</li> <li>2. Perform and document the results of an automated hemoglobin by a single analyze instrument</li> <li>3. Perform and document the results of an erythrocyte sedimentation rate (ESR)</li> </ol> <p>B. CLIA waived chemistry test</p> <ol style="list-style-type: none"> <li>1. Perform and document the results of a blood glucose</li> <li>2. Perform and document the results of cholesterol testing</li> <li>3. Perform and document the results of a human thyroid stimulating hormone (TSH)</li> </ol> <p>C. CLIA waived urinalysis</p> <ol style="list-style-type: none"> <li>1. Perform and document the results of a urinalysis <ol style="list-style-type: none"> <li>a. Manual</li> <li>b. Automated</li> </ol> </li> </ol> <p>D. CLIA waived immunology test</p> <ol style="list-style-type: none"> <li>1. Perform and document the results of beta HCG testing</li> <li>2. Perform and document the results of mononucleosis testing</li> <li>3. Perform and document the results of rapid strep testing</li> <li>4. Perform and document the results for <i>H. pylori</i> testing</li> <li>5. Perform and document the results for influenza A/B testing</li> </ol> <p>E. CLIA waived microbiology test</p> <ol style="list-style-type: none"> <li>1. Perform and document the results of strep testing</li> <li>2. Perform and document influenza A/B testing</li> <li>3. Perform and document HIV testing</li> </ol>

I.P.12. Produce up-to-date documentation of current provider/professional level CPR	Participate in and complete healthcare provider/professional level CPR certification offered by an approved organization such as the American Red Cross or the American Heart Association.
I.P.13. Perform first aid procedures for: <ul style="list-style-type: none"> <li>a. bleeding</li> <li>b. diabetic coma or insulin shock</li> <li>c. fractures</li> <li>d. seizures</li> <li>e. shock</li> <li>f. syncope</li> </ul>	Perform and document first aid procedures for: <ul style="list-style-type: none"> <li>a. bleeding.</li> <li>b. diabetic coma or insulin shock</li> <li>c. fractures</li> <li>d. seizures</li> <li>e. shock</li> <li>f. syncope</li> </ul>

<b>Affective</b>	
I.A.1. Incorporate critical thinking skills when performing patient assessment.	<p>A. Scenario: Screen a patient calling with several symptoms to determine the next course of action (for example, appointment today, next available, report to hospital, call for emergency transport).</p> <p>B. Scenario: Medical Assistant uses critical thinking to determine the appropriate size and gauge of needle to use on a malnourished patient for an intramuscular injection.</p>
I.A.2. Incorporate critical thinking skills when performing patient care.	Scenario: Without guidance, the medical assistant identifies a breach in clean/sterile environment of a patient undergoing a blood draw and notes the corrective action.
I.A.3. Show awareness of a patient's concerns related to the procedure being performed.	<p>A. Scenario: Medical assistant reassures a patient undergoing a blood draw for the first time who expresses concern and apprehension.</p> <p>B. Scenario: Medical assistant reassures a patient undergoing her first gynecological exam who is nervous and anxious.</p>

## Content Area II: Applied Mathematics

Psychomotor	
<p>II.P.1. Calculate proper dosages of medication for administration.</p>	<p>A. Use drug references and medication labels to obtain information on the correct dosage of a medication to be administered.</p> <p>B. Calculate the correct dose ordered using the appropriate method:</p> <ol style="list-style-type: none"> <li>1. Body Surface Area calculation in metric or household units</li> <li>2. Measurement unit conversion</li> <li>3. Measurement system conversion</li> <li>4. West's Nomogram</li> <li>5. Kilogram of body weight</li> <li>6. Proportional method</li> <li>7. Formula method</li> <li>8. Young's, Fried's or Clark's formula</li> <li>9. Sliding scale</li> </ol> <p>C. Verify calculations.</p> <p>D. Select appropriate equipment, measure accurately, and dispense/withdraw correct dose.</p>
<p>II.P.2. Differentiate between normal and abnormal test results.</p>	<p>A. Use reference values from sample lab reports to identify normal and abnormal results for CLIA-Waived tests and compare with obtained and tested sample</p> <p>B. Use reference values found on urinalysis reagent strips to identify normal and abnormal test results</p> <p>C. Analyze results of vision and audiometry testing to identify normal and abnormal responses</p>

<p>II.P.3. Maintain lab test results using flow sheets.</p>	<p>A. Use a flow sheet to document the following types of laboratory test results:</p> <ol style="list-style-type: none"> <li>1. Prothrombin/INR</li> <li>2. Glucose</li> <li>3. Glycosylated hemoglobin (hemoglobin A1C)</li> <li>4. Lipid panel</li> <li>5. Liver function panel</li> </ol> <p>B. Place completed flow sheets in patient's medical record.</p>
<p>II.P.4. Document on a growth chart.</p>	<p>Measure and record infant length, weight, head and chest circumference on a growth chart.</p> <p>Measure and record height and weight of a child on a growth chart.</p>

<b>Affective</b>	
<p>II.A.1. Reassure a patient of the accuracy of the test results.</p>	<p>A. Scenario: Patient questions the accuracy of the blood pressure readings obtained using their home monitor. The medical assistant requests that the patient bring the monitor to the office so the results can be compared with the equipment used by the clinic.</p> <p>B. Scenario: Patient calls or arrives at the office after having taken several pregnancy tests and is anxious regarding the accuracy of the results. The medical assistant reassures the patient that the tests available in OTC are the same used in the medical practice.</p> <p>C. Scenario: Patient questions the accuracy of the glucose readings obtained using their glucometer. The medical assistant requests that the patient bring their glucometer to the office so the results can be compared with the glucometer used by the clinic.</p>

## CONTENT AREA III: Infection Control

Psychomotor	
III.P.1. Participate in bloodborne pathogen training.	<p>A. Participate in bloodborne pathogen training offered by an approved organization such as the American Red Cross or the American Heart Association.</p> <p>B. Participate in scenario-based bloodborne pathogen training with documentation.</p>
III.P.2. Select appropriate barrier/personal protective equipment (PPE).	<p>A. Select appropriate barrier/personal protective equipment for an assigned activity</p> <p>B. Assess role-playing to demonstrate correct and incorrect use of PPE for different scenarios:</p> <ol style="list-style-type: none"> <li>1. Performing vital signs on a patient who has tested positive for tuberculosis and who has not yet initiated antimicrobial treatment.</li> <li>2. Changing a dressing on a patient with second degree burns</li> <li>3. Performing venipuncture to obtain blood for a CBC and fasting glucose</li> <li>4. Obtaining sample of wound exudate for microbiology</li> </ol>
III.P.3 Perform hand washing.	<p>A. Differentiate between direct and indirect contact, and apply to hand washing techniques</p> <p>B. Perform medical septic hand wash and hand sanitization</p> <p>C. Perform a surgical scrub</p> <p>D. Perform a surgical scrub</p> <p>E. Perform hand sanitization using antibacterial gels and foams</p>
III.P.4. Prepare items for autoclaving.	<p>A. Select a solution and sanitize instruments in preparation for wrapping and sterilization</p> <p>B. Select an appropriate wrapping material and indicator</p> <p>C. Sanitize and wrap an item or items to be used in autoclave</p>
III.P.5. Perform sterilization procedures.	Operate an autoclave, observing instructions for time, temperature and pressure appropriate for the item(s) being sterilized

III.P.6. Prepare a sterile field.	Prepare a sterile field for a minor office surgery (i.e. cyst removal)
III.P.7. Perform within a sterile field.	Assist with minor surgery.
III.P.8. Perform wound care.	Assess and irrigate a wound.
III.P.9. Perform dressing change.	Assess and perform a dressing change.
III.P.10. Demonstrate proper disposal of biohazardous material: a. sharps b. regulated wastes	A. Disposal of venipuncture equipment  B. Disposal of wound dressing change material

### Affective

III.A.1. Recognize the implications for failure to comply with Center for Disease Control (CDC) regulations in healthcare settings.	A. Scenario: Patient presents with a communicable disease, which is not reported by the designated staff member. The medical assistant alerts the physician or clinical supervisor or office manager regarding the failure and explains the implications to the provider.  B. Scenario: A medical assistant does not wear gloves during a dressing change and hands are contaminated with body fluids. What are the implications for the patient and the medical assistant's health and safety?
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## CONTENT AREA IV: Nutrition

### Psychomotor

IV.P.1. Instruct a patient according to a patient's special dietary needs.	A. Using a meal plan for a patient's special dietary needs instruct the patient on how to follow the plan.  B. Instruct a patient with a newly identified special dietary need in proper nutrition.  C. Scenario: Role play providing a patient instructions regarding a heart healthy diet.
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Affective	
IV.A.1. Show awareness of patient's concerns regarding a dietary change.	Scenario: New heart patient has been instructed to change diet, but is concerned that the change will be difficult to adopt, since the rest of his family has no dietary restrictions. Medical assistant uses appropriate body language and verbal acknowledgment to display empathy, provide supportive resources, and follow proper protocol.

## CONTENT AREA V: Applied Communication

Psychomotor	
V.P.1. Use feedback techniques to obtain patient information including: <ul style="list-style-type: none"> <li>a. reflection</li> <li>b. restatement</li> <li>c. clarification</li> </ul>	<p>A. Scenario: Obtain a patient history, asking about past medical, social and family histories. Use the reflective technique to assist the patient in recalling this information.</p> <p>B. Scenario: Obtain a patient history asking about previous conditions. Use restatement technique to verify the information provided.</p> <p>C. Scenario: Obtain a patient history about allergies. When the patient responds in the affirmative, use a clarification technique to determine the patient's specific allergies.</p>
V.P.2. Respond to nonverbal communication.	<p>A. Scenario: Identify and respond to nonverbal communication such as personal space, posture, facial expressions or gestures.</p> <p>B. Scenario: Demonstrate interaction with a patient or co-worker using appropriate eye contact, touch, and facial expression.</p>
V.P.3. Use medical terminology correctly and pronounced accurately to communicate information to providers and patients.	<p>A. Scenario: Communicate with a "patient" about his/her diabetes or other chronic condition, using medical terms appropriately and pronouncing the words correctly. If necessary for understanding, translate the medical terms used for the patient.</p> <p>B. Scenario: Verbally transfer patient information to a healthcare provider using correct pronunciation of medical terms.</p>



<p>V.P.4. Coach patients regarding:</p> <ol style="list-style-type: none"> <li>a. office policies</li> <li>b. health maintenance</li> <li>c. disease prevention</li> <li>d. treatment plan</li> </ol>	<p>A. Prepare an Office Policy manual or brochure which includes policies regarding "office hours," "appointments," "patient's financial responsibilities," "medication refill policies," and so on.</p> <p>B. Provide patient education on the importance of health and wellness that is age appropriate for the patient.</p> <p>C. Provide appropriate office brochure(s) pertaining to a particular condition such as diabetes and the importance of diet, exercise, weight control, and so on, in relation to that disease.</p> <p>D. Scenario: Converse with an elderly patient who does not understand the importance of recommended immunizations.</p> <p>E. Scenario: Converse with a patient who does not want to follow physician instructions for a prescribed diet, physical therapy regimen or medication.</p>
<p>V.P.5. Coach patients appropriately, considering:</p> <ol style="list-style-type: none"> <li>a. cultural diversity</li> <li>b. developmental life stage</li> <li>c. communication barriers</li> </ol>	<p>A. Scenario: converse with a patient whose cultural beliefs limit understanding of a medical procedure.</p> <p>B. Scenario: explain a medical procedure to a child and/or elderly patient.</p> <p>C. Scenario: explain a procedure to a patient who has a vision, speech, or hearing impairment or who speaks a different language.</p>
<p>V.P.6. Demonstrate professional telephone techniques</p>	<p>A. Demonstrate the correct technique to use when answering the telephone in a medical office.</p> <p>B. Demonstrate professional telephone techniques, emphasizing how projecting a professional image as a medical assistant affects the public's impression of the medical facility.</p> <p>C. Use proper telephone etiquette when receiving calls and making outgoing calls in the medical office, including but not limited to courtesy, attitude, quality of voice, smiling, and so on</p>
<p>V.P.7. Document telephone messages accurately.</p>	<p>No suggestions needed.</p>
<p>V.P.8. Compose professional correspondence utilizing electronic technology.</p>	<p>A. Prepare a business letter to communicate medical information such as a letter of referral, patient test results, or an insurance prior authorization.</p>

V.P.9. Develop a current list of community resources related to patients' healthcare needs.	No suggestions needed.
V.P.10. Facilitate referrals to community resources in the role of a patient navigator.	A. Generate a referral for a patient, utilizing a list of community resources.  B. Scenario: Refer a patient who is unable to afford prescribed medications to an appropriate community resource.
V.P.11. Report relevant information concisely and accurately.	A. Scenario: Demonstrate how to inform the patient about laboratory test results.  B. Scenario: The patient reports inability to take the prescribed medication. Obtain the reason for the patient being unable to take the medication and a telephone message for the physician documenting the information.

Affective	
V.A.1. Demonstrate: <ul style="list-style-type: none"> <li>a. empathy</li> <li>a. active listening</li> <li>b. nonverbal communication</li> </ul>	A. Scenario: show empathy (facial expressions, verbal utterances, gestures and body language) when interacting with a patient who has just been diagnosed with a chronic debilitating disease.  B. Scenario: Interview a patient and prepare a medical history using active listening skills.  C. Scenario: use appropriate body language and other nonverbal skills, when obtaining/updating a patient's medical history or reason for the current visit.
V.A.2. Demonstrate the principles of self-boundaries.	A. Scenario: Respond to a patient's request when he/she requests your personal number, in case of questions after hours.  Prepare examples of appropriate and inappropriate personal postings on social media, and demonstrate them to the class.

<p>V.A.3. Demonstrate respect for individual diversity including:</p> <ol style="list-style-type: none"> <li>gender</li> <li>race</li> <li>religion</li> <li>age</li> <li>economic status</li> <li>appearance</li> </ol>	<p>A. Role-play scenarios in which each of these biases interfere with patient care. Describe why it is important to the staff and patient for these to be addressed prior to providing care, in order to ensure quality care.</p>
<p>V.A.4. Explain to a patient the rationale for performance of a procedure.</p>	<p>A. Role-play: Respond appropriately to a child who verbalizes fear that a throat culture will be painful.</p> <p>B. Role-play: Respond appropriately to a patient who questions why you are using PPE when changing a wound dressing.</p>

## CONTENT AREA VI: Administrative Functions

<b>Psychomotor</b>	
<p>VI.P.1. Manage appointment schedule, using established priorities</p>	<p>A. Schedule patients' appointments using a manual or electronic system while following established guidelines for the following:</p> <ol style="list-style-type: none"> <li>New patient</li> <li>Established patient</li> </ol> <p>B. Adhering to the office appointment policy, perform and document appropriately the following scheduling processes:</p> <ol style="list-style-type: none"> <li>A patient cancellation</li> <li>A no-show appointment</li> <li>A rescheduled appointment</li> </ol>
<p>VI.P.2. Schedule a patient procedure</p>	<p>A. Scenario: Schedule a patient for a diagnostic testing procedure that requires patient preparation. (Colonoscopy, radiology procedures, and so on)</p> <p>B. Scenario: Schedule a simulated inpatient or outpatient procedure (surgical procedure, medical admission).</p>
<p>VI.P.3. Create a patient's medical record</p>	<p>A. Create a manual or electronic medical record according to the needs and guidelines of the medical practice</p>

VI.P.4. Organize a patient's medical record	<p>A. Sort and place reports, forms or letters in a patient's manual medical record</p> <p>B. Scan and place reports, forms or letters in a patient's electronic medical record</p>
VI.P.5. File patient medical records	<p>A. Arrange a group of names in alphabetical order, applying indexing rules</p> <p>B. Arrange a group of charts in alphabetical or numerical order</p>
VI.P.6. Utilize an EMR	<p>A. Using an EMR, do the following:</p> <ol style="list-style-type: none"> <li>1. Enter patient information, such as medical history, social and family history, drug allergies, vital signs, and so on.</li> <li>2. Enter a physician-ordered diagnostic test or prescription</li> </ol>
VI.P.7. Input patient data utilizing a practice management system	<p>A. Using a practice management system or an EMR, do the following:</p> <ol style="list-style-type: none"> <li>1. Enter new patient demographic information</li> <li>2. Update established patient demographic information</li> </ol>
VI.P.8. Perform routine maintenance of administrative or clinical equipment	<p>A. Utilize a maintenance check list for administrative or clinical equipment that includes the following:</p> <ol style="list-style-type: none"> <li>1. Date of inspection</li> <li>2. Equipment inspected</li> <li>3. Location of equipment</li> <li>4. When next inspection is due (daily, weekly, monthly, annually)</li> <li>5. Condition of equipment</li> <li>6. Any repairs needed</li> <li>7. Routine maintenance performed (such as changing toner, changing microscope bulb, and so on)</li> </ol>
VI.P.9. Perform an inventory with documentation	<p>A. Utilize an inventory check list of administrative and/or clinical supplies or equipment that includes the following:</p> <ol style="list-style-type: none"> <li>1. Date of inventory</li> <li>2. Supplies or equipment inventoried</li> <li>3. Location of supplies or equipment</li> <li>4. Indicate if reorder is needed</li> </ol>

<b>Affective</b>	
VI.A.1. Display sensitivity when managing appointments	Scenario: Display sensitivity when making an appointment for a patient with an abnormal mammogram.

## CONTENT AREA VII: Basic Practice Finances

<b>Psychomotor</b>	<b>ECMA</b>
VII.P.1. Perform accounts receivable procedures to patient accounts, including posting: <ul style="list-style-type: none"> <li>a. charges</li> <li>b. payments</li> <li>c. adjustments</li> </ul>	Using simulated services (manual or computer), post the following to a patient's account: <ul style="list-style-type: none"> <li>a. charges</li> <li>b. payments (personal or third party)</li> <li>c. adjustments (personal or third party)</li> </ul>
VII.P.2. Prepare a bank deposit	No suggestions needed.
VII.P.3. Obtain accurate patient billing information	Scenario: obtain accurate patient billing information (such as a photo ID, insurance card, and so on)
VII.P.4. Inform patients of their financial obligations for services rendered	<p>A. Scenario: Using a practice's financial policies, determine the amount owed by a patient for services rendered, and inform the patient of the financial obligation.</p> <p>Develop a patient brochure that details the patient's financial obligations in accordance with the practice's financial policies.</p>

<b>Affective</b>	
VII.A.1. Demonstrate professionalism when discussing a patient's billing record	Scenario: Demonstrate professionalism when requesting that a patient pay the charges for services rendered, (such as copayments, coinsurance amounts, deductibles or a past due bill)
VII.A.2. Display sensitivity when requesting payment for services rendered	<p>Scenario: Demonstrate sensitivity in the following situations:</p> <ul style="list-style-type: none"> <li>a. asking a patient for the copay due for a service rendered</li> <li>b. a patient indicates they have no available funds</li> </ul>

## CONTENT AREA VIII: Third Party Reimbursement

<b>Psychomotor</b>	
VIII.P.1. Interpret information on an insurance card	Scenario: Determine carrier policy requirements based on patient's insurance card.
VIII.P.2. Verify eligibility for services including documentation	Scenario: Contact the insurance company and verify eligibility for services
VIII.P.3. Obtain precertification or preauthorization, including documentation	Scenario focused on the following: <ol style="list-style-type: none"> <li>1. determine need for precertification or preauthorization</li> <li>2. identify information needed to obtain precertification or preauthorization</li> <li>3. simulate obtaining the required permission</li> <li>4. document appropriately in the patient's chart.</li> </ol>
VIII.P.4. Complete an insurance claim form	No suggestions needed.
<b>Affective</b>	
VIII.A.1. Interact professionally with third party representatives	Scenario: Demonstrate assertive but professional, communication with third-party representatives
VIII.A.2. Display tactful behavior when communicating with medical providers regarding third-party requirements	Scenario: Communicate tactfully with medical providers regarding third-party requirements: <ol style="list-style-type: none"> <li>1. additional documentation needed to support medical necessity</li> <li>2. preauthorization for prescribed medications</li> <li>3. second opinion before elective surgery</li> </ol>
VIII.A.3. Show sensitivity when communicating with patients regarding third-party requirements	Scenario: Show sensitivity when explaining to the patient (in terms that they can understand) regarding third-party requirements: <ol style="list-style-type: none"> <li>1. preauthorization or precertification requirements</li> <li>2. copayments, coinsurance, deductibles</li> <li>3. second surgical opinions</li> </ol>

## CONTENT AREA IX: Procedure & Diagnostic Coding

Psychomotor	
IX.P.1. Perform procedural coding	<p>A. Locate and document codes from the current CPT manual.</p> <p>B. Analyze a simulated patient chart and code the procedures from the current CPT manual.</p>
IX.P.2. Perform diagnostic coding	<p>A. Locate and document codes from the most current diagnostic coding system.</p> <p>B. Extract diagnoses from sample medical records and code to the highest level of specificity.</p>
IX.P.3. Utilize medical necessity guidelines	<p>A. Using medical necessity guidelines (national or local), review a case study to determine if the documentation supports a physician ordered diagnostic test.</p> <p>B. Scenario: Link diagnostic codes to the proper procedure codes based on medical necessity guidelines</p>

Affective	
IX.A.1. Utilize tactful communication skills with medical providers to ensure accurate code selection	Simulate a meeting in which a medical assistant discusses with a medical provider the importance of and the methods needed to achieve correct coding for reimbursement.

## CONTENT AREA X: Legal Implications

Psychomotor	
X.P.1. Locate a state's legal scope of practice for medical assistants.	Have students research the scope of practice for medical assistants in the state in which they reside and submit a summary of the scope of practice and where it is located.

<p>X.P.2. Apply HIPAA rules in regard to:</p> <ul style="list-style-type: none"> <li>a. privacy</li> <li>b. release of information</li> </ul>	<p>A. Scenario: A family member of a patient calls and requests information regarding the patient. Demonstrate how this situation should be handled.</p> <p>B. Complete an authorization to release medical records.</p>
<p>X.P.3. Document patient care accurately in the medical record.</p>	<p>A. Record/document vital signs and chief complaint on paper or electronic progress notes.</p> <p>B. Scenario: Document in a patient's medical record, the removal of sutures, including the number of sutures removed.</p> <p>C. Document the preparation of a patient for a surgical procedure, x-ray or other treatment in an outpatient facility.</p> <p>D. Scenario: Document the results of laboratory tests and treatments using correct medical terminology.</p>
<p>X.P.4. Apply the Patient's Bill of Rights as it relates to:</p> <ul style="list-style-type: none"> <li>a. choice of treatment</li> <li>b. consent for treatment</li> <li>c. refusal of treatment</li> </ul>	<p>A. Scenario: Respond to a patient who is presented with two choices for treatment and chooses the one not recommended by the provider.</p> <p>B. Scenario: Respond to a patient who is refusing to consent to receive medical care due to a cultural belief.</p> <p>C. Scenario: Communicate with a parent of a minor who does not want the minor immunized.</p>
<p>X.P.5. Perform compliance reporting based on public health statutes.</p>	<p>Scenario: Follow proper procedure when a reportable disease is confirmed in a patient by identifying and notifying the proper agency.</p>
<p>X.P.6. Report an illegal activity in the healthcare setting following proper protocol.</p>	<p>A. Scenario: Follow proper reporting protocol when an OSHA violation has occurred.</p> <p>B. Scenario: You have witnessed a co-worker removing drug samples from the storage cabinet for personal use. Role-play the steps and chain of command for reporting the incident.</p>



X.P.7. Complete an incident report related to an error in patient care.	No suggestions needed.
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<b>Affective</b>	
X.A.1. Demonstrate sensitivity to patient rights.	Using the Patient's Bill of Rights, describe how a medical assistant should inform the provider regarding a patient's refusal of treatment.
X.A.2. Protect the integrity of the medical record.	<p>Scenario: Explain tactfully to a co-worker how to maintain confidentiality of the medical record.</p> <ol style="list-style-type: none"> <li>1. Patient chart is left in an exam room.</li> <li>2. Computer monitor privacy screen has been removed and identifiable patient information is visible.</li> <li>3. The co-worker has shared his/her electronic record password with another employee</li> </ol>

## CONTENT AREA XI: Ethical Consideration

<b>Psychomotor</b>	
XI.P.1. Develop a plan for separation of personal and professional ethics.	<p>A. Scenario: A medical assistant who is ethically opposed to abortion is asked to refer a patient to a clinic that performs elective abortions. Develop a plan detailing how the medical assistant would fulfill professional duties without allowing personal ethics to influence the care of the patient.</p> <p>B. Describe an incident in which the medical assistant would set aside personal beliefs in order to provide compassionate and professional care to a patient who practices a different religion than his/her own.</p>

<p>XI.P.2. Demonstrate appropriate response(s) to ethical issues.</p>	<p>A. Scenario: A patient pays his bill in cash. At the end of the day, the medical assistant discovers that he/she failed to give the correct change to that patient, resulting in a significant cash overage. Identify the ethical issue and demonstrate the appropriate response.</p> <p>B. Scenario: During a particularly busy day while setting up a sterile field, the medical assistant inadvertently contaminates the field, but continues setting up for the procedure and does not inform the provider of the breach. Identify the ethical issue and demonstrate the appropriate response.</p> <p>C. Scenario: A patient offers a gratuity to the medical assistant who helped him/her obtain samples of medication. Identify the ethical issue and demonstrate the appropriate response.</p>
<p><b>Affective</b></p>	
<p>XI.A.1. Recognize the impact personal ethics and morals have on the delivery of healthcare.</p>	<p>A. Scenario: Due to an error, a deficient dose of antibiotic was administered to a patient. Discuss potential implications to the patient's health for not reporting this error.</p> <p>B. Scenario: Describe a situation in which personal morals might interfere with the ability to perform duties as a medical assistant. Respond to this dilemma in a professional manner without compromising patient care or personal integrity.</p>

## CONTENT AREA XII: Protective Practices

Psychomotor	
<p>XII.P.1. Comply with:</p> <ol style="list-style-type: none"> <li>a. Safety signs</li> <li>b. Symbols</li> <li>c. labels</li> </ol>	<p>A. Properly store and dispose of supplies and specimens according to Standard Precautions and OSHA guidelines.</p> <p>B. Perform a review of the facility to ensure that the following have the appropriate labels and correct as necessary:</p> <ol style="list-style-type: none"> <li>1. Refrigerator used to store reagents, test kits, or biological specimens are labeled with a biohazard symbol and bear the legend “not for storage of food or medications.”</li> <li>2. Biohazard waste receptacles bear the biohazard symbol and are lined with red plastic bags. Biohazard waste is not disposed of in inappropriate receptacles</li> <li>3. Chemicals and reagents are evaluated for hazard category classification and labeled with the National Fire Association’s color and number coding.</li> <li>4. Signs are clearly posted in appropriate places for prohibiting smoking, eating, drinking, or application of cosmetics or contact lenses in the facility.</li> </ol>
<p>XII.P.2. Demonstrate proper use of:</p> <ol style="list-style-type: none"> <li>a. Eyewash equipment</li> <li>b. fire extinguishers</li> <li>c. sharps disposal containers</li> </ol>	<p>A. Demonstrate use of the eyewash station and explain how the nature of the contaminant influences the length of time for flushing the eyes after exposure.</p> <p>B. Evaluate the fire extinguisher’s rating and demonstrate the proper method of use according to the manufacturer’s instructions.</p> <p>C. Demonstrate the proper use of sharps disposal containers and describe the fill height and proper disposal of the containers.</p>

<p>XII.P.3. Use proper body mechanics.</p>	<p>A. Demonstrate correct body mechanics to safely assist the physician and the patient during an examination.</p> <p>B. Demonstrate correct body mechanics while assisting the patient on and off a scale.</p> <p>C. Demonstrate correct body mechanics while assisting a patient during wheelchair transfer.</p> <p>D. Demonstrate correct body mechanics while lifting or moving a heavy box.</p>
<p>XII.P.4. Participate in a mock exposure event with documentation of steps taken.</p>	<p>A. Use a scenario to identify exposure control mechanisms in a simulated exposure event and document the steps taken to handle the exposure event.</p> <p>B. Plan and participate in a mock environmental exposure event in the home. Prepare the family members in the necessary steps needed for personal and family safety.</p> <p>C. Plan and participate in a mock environmental exposure event in the medical office. Prepare the staff in the necessary steps needed for personal and patient safety</p>
<p>XII.P.5. Evaluate the work environment to identify unsafe working conditions.</p>	<p>A. Utilizing a checklist, perform a safety inspection of your facility at intervals according to institution policy and report to your instructor.</p> <p>B. Using scenarios, perform safety inspections of a facility at intervals according to institutional policy and report findings to the instructor.</p> <p>C. Verify that needle stick prevention devices (safety needles) are used and proper disposal is performed.</p>

<b>Affective</b>	
<p>XII.A.1. Recognize the physical and emotional effects on persons involved in an emergency situation.</p>	<p>Scenario: Identify the manifestations of stress such as sleep deprivation, decreased social skills, change in appetite and a feeling of powerlessness and relate the manifestation to the stress event.</p>

<p>XII.A.2. Demonstrate self-awareness in responding to an emergency situation.</p>	<p>A. Perform a self-evaluation of your knowledge and skills required in an emergency situation.</p> <p>B. Create scenarios of how you would handle emergency situations.</p>
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