

Medical Assistant (MA) Orientation Competency Checklist



Employee:				Primary Preceptor(s):		
Clinic:				Date:		
Week	Day/Time	Location	Orientation Activity	Date Completed	Preceptor Initials	Employee Initials
<i>In weeks 1 and 2, the new employee will attend training sessions, meet and shadow their preceptor and complete UVM Medical Center Mandatories and Clinical Competencies. They will not function independently until their skills are assessed and signed off by their preceptor(s) in weeks 4-6.</i>						
Week One	Monday 8:00am-4:30pm	McClure Lobby Conference Room	University of Vermont Medical Center New Employee Orientation Badges Benefits Mission/Vision/Values	Date of Class:		
	Tuesday 8:00am-5:00pm	MGET Class	UVM Medical Group Culture and Tour Orientation (Lunch Provided): University of Vermont Medical Center History Site Tour UVM Medical Group Practice Standards & Commitments	Date of Class:		
			AIDET/Communication Workshop: Communication Methods/Barriers AIDET Giving Feedback Receiving Feedback Service Recovery UVM Medical Center Policy: Customer Feedback	Date of Class:		
	Wednesday Clinic Hours	In Clinic	Conducted Environment of Care (EOC) Tour of Clinic, reviewing all items on weekly EOC Checklist Kronos process Biohazard Disposal** Clinic Light/Alarm Bathroom Alarms/Key/Coin Access Panic button (if applicable) Emergency Response Equipment Satellite spill kit (supplies & procedure), if applicable			
			Reviewed: Site Emergency Response Protocol, including outline of employee's role/responsibilities, 111 vs. 911, building evacuation plan			
			Site Fire and Emergency Plans			
			Safe Report Process			
			Site Manual, Lab Manual, MSDS EOC Safety			
			Completed eLearn Mandatories: Emergency Management Ergonomics Fire Safety General Safety Patient Confidentiality			
			Read UVM Medical Group Practice Standards & Commitments			
Reviewed how to access University of Vermont Medical Center policies						
Shadowed employees in other clinic areas for exposure to the full site workflow						
Shadowed rooming process, with a focus on relevant items from the following clinical skills: Temperature, Blood Pressure, Pulse, Respiratory Rate, Height, Weight, Pain Screening, Pulse Oximetry, Orthostatic VS						
Thursday Clinic Hours	In Clinic	Reviewed Infection Control Practices policy and demonstrated understanding of Infection Control guidelines, including Universal Precautions, isolation techniques, hand hygiene, and aseptic technique. UVM Medical Center Policy: Infection Prevention Practices UVM Medical Center Policy: Cleaning of Invasive Procedure Rooms MGET Sharepoint - Infection Prevention - Ambulatory Cleaning Standards				

Week One	Thursday Clinic Hours	In Clinic	Completed eLearn Mandatories: <i>Age Specific</i> <i>Bloodborne Pathogens</i> <i>General Infection Prevention</i> <i>Hazard Communications</i> <i>Patient Safety</i>			
			Reviewed Office Visit Types: Acute Visits Problem Office Visit Nurse Visits/MD Wellness Visits/Physical Exams Additional Clinic Specific Visit Types			
			Reviewed opening and closing exam rooms/exam room preparation, including clinic-specific exam room contents			
			Shadowed rooming process, with a focus on relevant items from the following clinical skills: Temperature, Blood Pressure, Pulse, Respiratory Rate, Height, Weight, Pain Screening, Pulse Oximetry, Orthostatic VS			
	Friday Clinic Hours	In Clinic	Shadowed Check-In, Check-out, telephone etiquette			
			Completed eLearn Clinical Competencies: <i>Audiometry, Casting, General Cleaning, High Level Disinfection, Sterilization, Dressing Change, Ear Lavage, EKG, Electrosurgical Unit/Cautery and Surgical Fires, Eye Irrigation, Pain Screening (As applicable, per site)</i>			
Completed eLearn Mandatories: <i>Information Security</i> <i>Integrity & Compliance</i> <i>Stroke Heroes Act F.A.S.T.</i> <i>Utilities</i> <i>Victims of Abuse</i>						
Verified new employee access for the following log-ins: PRISM GE						
		Shadowed employees in other clinic areas for exposure to the full site workflow				
		Conducted Preceptor/Supervisor/New Employee Review & Training Evaluation				
Week Two	Monday 8:00am-5:00pm	MGET Classes	Introduction to Systems Class: Introduction to PRISM & GE Web Overview of System Workflows Regulatory Readiness Class: Joint Commission National Patient Safety Goals CMS Regulatory Standards Prohibited Abbreviations <i>UVMHC Policy: Prohibited Abbreviations</i>	Date of Class:		
	Tuesday 8:00am-12:00pm	MGET Class	Scheduling Class: Scheduling, canceling, no showing, and pending appointments Printing reports	Date of Class:		
	Tuesday 1:00pm-5:00pm	In Clinic	Shadowed telephone triage			
			Oriented employee to clinic schedule and workflow: Provider Schedules & Provider Assignment Completed eLearn Clinical Competencies: <i>Nail and Foot Care, O2 Tank Safety, Pulmonary Functions, Sensitive Exam, Suture and Staple Removal, Tuberculin Skin Testing, Unna Boot Placement, Visual Acuity Testing, Vital Signs (As applicable, per site)</i>			
	Wednesday 8:00am-12:00pm	MGET Class	Clinical PRISM Class: PRISM workflows, as related to Clinical Rooming Placing Orders Enter/Edit Results & Documentation	Date of Class:		
Wednesday 1:00pm-5:00pm	In Clinic	Shadowed rooming process, with new employee entering into the Visit Navigator data collected by the preceptor				

Week Two	Thursday 8:00am- 12:00pm	MGET Class	Clinical Rooming & Simulation Class: Vital Signs Medication Reconciliation Screenings (tobacco, pain, fall risk) Sensitive Exams Room Disinfection EKG Incorporating AIDET/Communication skills into the CCA/MA role Practice in PRISM Demo Environment UVMCC Policy: Medication Reconciliation MGET Sharepoint - Infection Prevention - Ambulatory Cleaning Standards UVMCC Policy: Cleaning of Ambulatory Clinic Room UVMCC Policy: Intimate Examinations UVMCC Policy: Cleaning of Invasive Procedure Rooms	Date of Class:		
	Thursday 1:00pm-5:00pm	In Clinic	Shadowed rooming process, with new employee entering into the Visit Navigator data collected by the preceptor and beginning to complete rooming tasks under supervision of the preceptor			
	Friday Clinic Hours	In Clinic	Reviewed site specific rooming protocols, if applicable Shadowed rooming process, with new employee entering into the Visit Navigator data collected by the preceptor and beginning to complete rooming tasks under supervision of the preceptor Conducted Preceptor/Supervisor/New Employee Review & Training Evaluation			

In weeks 3-6, the new employee should be gaining independent skills with the support/availability of their preceptor. The new employee will demonstrate the skills listed below and the preceptor will attest to the employee's mastery prior to independent practice.

Week	Orientation Activity	Date Completed	Preceptor Initials	Employee Initials	
Weeks Three-Six	Scope of Practice				
		Demonstrates understanding of HIPAA policies and procedures UVMCC Policies: HIPAA			
		Reviews UVM Medical Center MA/CCA Scope of Practice			
	Accessing Reference Materials				
		Demonstrated ability to obtain University of Vermont Medical Center policies			
	GE Web				
		Completed GE Systems Training (if additional training is applicable)			
	CPR				
		Obtained current CPR certification, per job description. UVM Medical Group Education & Training SharePoint Site - CPR Schedule			
	Telephone Etiquette				
		Answering phone: Smiled Introduced self Asked "Is there anything else I can do for you today?" Thanked the caller Transferring calls: Avoided blind/unannounced transfer			
	Communication/Customer Service/Patient Satisfaction				
		Acknowledged patient's presence, thoughts and emotions			
		Introduced self with name and credentials and described role/responsibility with regard to patient's care			
		Duration: Let the patient know how long a task would take. Kept the patient notified of wait times			
	Explanation: Provided explanations of clinic processes				
	Thank you: Thanked the patient or visitor				
	Modified communication with patient, based on verbal and nonverbal feedback				

Weeks Three-Six			Service Recovery Methods: Listened actively Apologized for not meeting the patient's expectations and notified Practice Supervisor Took responsibility for ensuring the patient's concern was addressed Corrected the service issue per Practice Supervisor/Manager Thanked the patient for the opportunity to improve Understands clinic-specific service recovery methods/resources				
			Limits personal conversations to areas where patients cannot overhear them				
			Works collaboratively with all members of care team to provide a seamless patient experience				
			Provides and accepts feedback from team members				
			Uses respectful verbal and nonverbal communication with other team members				
			Observes and demonstrates coordination of Interpreter Services				
			Consistently manages InBasket message inflow				
	Prepare Exam Room						
			Correctly prepares exam rooms, exam equipment and necessary trays for all visit types				
			Cleans room according to cleaning standards				
			Stocks exam rooms per clinic standards				
	Prepare Patient & Rooming Documentation per Clinic Standards						
			Verifies Patient Identity by obtaining 2 patient identifiers				
			Prints patient labels per visit type				
			Obtains and documents history				
			Obtains and documents the patient's chief complaint/reason for visit				
			Obtains and documents vital signs, per clinic standards/visit type				
			Completes Pain Screening				
		Reviews smoking status and documents accordingly; marks "Yes" in Counseling Given field and provides patient instructions to current smokers using .STOPSMOKINGSTAFF smartphrase					
		Completes Fall Risk Screening questions					
		Reviews allergies and documents accordingly					
		Reconciles Medication List and pends refills as appropriate					
		Administers all orders placed during the pre-visit chart preparation (within scope of practice) and documents patient education					
		Documents attestation statement MA/CCA-only visit					
		Pends additional orders per site protocol & MA/CCA scope of practice					
		Abstracts paper screening tools completed by patient into designated flowsheets					
		Notifies provider that patient is ready, per site protocol					
		Completes call in/mail prescription refills with a provider order					
Week Four	Friday Class: 8-12	MGET Class	Referral Management: Introductory Referral Management course around the complete workflow/expectations of the referral process	Date of Class:			
Week Five	Monday Class: 1-5pm	MGET Class	Clinical Review MA/LPN: PRISM review course expanding on Clinical PRISM and clinical content.	Date of Class:			
As Possible	Labs, Testing & Equipment - Employee will complete eLearn competencies and review any applicable policies. The preceptor will verify						
	POC Lab Testing - Collection and Test Performance						
	Confirm POCT status with supervisor						
			Glucometer				
			Hemoglobin				
			Urinalysis				
			UPT				
			Hemoccult				
			Throat Culture				
	Specimen Collection						
			Collecting Sputum				
			Nasal Pharyngeal Swabs				
			PKU Screening				
			Lead Screening				
	Testing Set-up and Completion						
		EKG					
		Peak Flow Meter					
		Spirometry					
		Visual Acuity					
		Audiometry					

	Durable Medical Equipment (DME) Site Specific Competency			
As Possible	Completing Checklists - Preceptor will observe new employee completing the following checklists:			
	Emergency Drug Box			
	AED			
	Eye Wash			
	O2 Tanks			
	Refrigerator Temperature Logs			
	Environment of Care weekly checklist			
	Minor Procedures - Employee will complete eLearn competencies and review any applicable policies. The preceptor will verify the new			
	Demonstrates understanding of the Consent and Final Verification process for all site appropriate procedures <i>UVMCC Policy: Outpatient Invasive Procedure Verification</i>			
	Dressing Changes			
	Sterilization Procedure			
	Cleaning Procedure			
	Unna Boot Procedure			
	Suture/staple Removal			
	Casting Procedure			
	Ear Lavage			
	Eye Irrigations			
	Tuberculin Skin Testing (PPD)			
	Handling Liquid Nitrogen <i>UVMCC Policy: Safe Use of Liquid Nitrogen</i>			
	Provider Assistance with Patient treatment (Varies by Clinic)			
Assists with Pelvic and Pap exams				
Provides and documents patient education relative to patient's diagnosis per protocol				
Provides normal test results to patients once reviewed and authorized by a provider				
Draws up and labels medications per provider orders <i>UVMCC Policy: Labeling of Medications and Solutions</i>				
Assists provider with minor office procedures such as tissue sampling, point of care testing, colposcopy, and casting/curling				
Please mark N/A when competency is not applicable				
Complete 90 day orientation assessment in eLearn.				

All preceptors involved in orientation of a new staff member/intern must sign and initial below.	
Preceptor signatures:	Date:
Completion signatures:	
Intern/Orientees	Date:
Primary Preceptor	Date:
Practice Supervisor/Manager	Date: