

MEDICAL ASSISTANT SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date	Last Action
4547	Medical Assistant	12	442	6 mo.	12/15/08	Rev.
4678	Medical Assistant (Credentialed/Certified)	12	442	6 mo.	06/01/17	Rev.

Promotional Line: 374

Series Narrative

Under direction of physicians, nurse practitioners, or other healthcare providers and medical staff, performs a variety of clinical and clerical tasks in an inpatient/outpatient clinic setting.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Medical Assistant

4547

Under the direction of physicians, nurse practitioners, or other healthcare providers and medical staff, performs a variety of clinical and clerical tasks for patients in a clinic setting.

A Medical Assistant typically performs the following duties per healthcare facility protocols (federal, state and university) and specific duties assigned -

1. Performs direct patient care tasks such as the following:
 - a. responds to patient's telephone inquiries giving factual information according to the nature of the question; secures patient information about illness and health problems
 - b. greets patient, checks appointment, updates patient information, demographics and insurance cards, and ensures the patient's medical records, including electronic records, are available to the physicians, nurse practitioners, or other healthcare providers
 - c. escorts or arranges to have patient escorted to examination or treatment room
 - d. completes and records patient's blood pressure, temperature, pulse, respiration, height, weight, and other data on appropriate medical records including electronic records
 - e. discusses with the patient the reason for his/her visit and records symptoms on the medical records including electronic records
 - f. administers basic tests, such as audio, visual, or lung stress tests
 - g. instructs the patient in certain aspects of health care as directed by the physicians, nurse practitioners, or other healthcare providers
 - h. relays information to the patient regarding preparation for various types of exams and the location of laboratories, pharmacy, and other treatment areas

2. Assists physicians, nurse practitioners, or other healthcare providers with conducting diagnostic and therapeutic procedures, e.g., drapes patient for exams and treatments, sets up treatment tray to be used in an examination, holds and hands various instruments to the doctor, adjusts lights or treatment tables, procures proper IUD for patient insertion, applies or removes simple bandages or dressings, and removes stitches and/or staples after the site has been inspected by a physician, nurse practitioner, other healthcare providers or a clinic nurse
3. Performs in-direct patient care tasks such as the following:
 - a. follows doctors/providers orders, requisitions of laboratory tests and procedures, such as X-ray, EKG, blood exams, and urinalysis
 - b. dispatches messages to other departments and makes appointments for patients requiring services in other departments or health care facilities, as requested by the medical staff
 - c. collects patient's specimens and returns them to the laboratory for analysis; provides necessary follow-up work, such as checking on test results
 - d. collects and bags soiled linen in the examining room; sets-up procedure rooms
 - e. cleans and sterilizes equipment and supplies
 - f. receives new supplies from supply source; checks supplies delivered against request for shortages and breakage; records errors or damages detected; places items in proper storage location in supply room; stocks examining rooms, insuring that appropriate medications and supplies are not expired and are available at all times
 - g. obtains pre-authorizations and referrals
4. Performs clerical duties such as the following:
 - a. maintains patient files, medical records including electronic records, treatment records, and laboratory results; completes patient charts as prescribed by the physicians, nurse practitioners, or other healthcare providers
 - b. maintains records of monetary charges to patients and forwards them to the business office
 - c. compiles periodic statistical reports from records and other data, such as clinic attendance, the number of patients seen by each doctor/provider, and the discharge service analysis
 - d. works with clerical support staff in sending out questionnaires, completing forms and organizing form letters to be sent out
 - e. provides routine request for patient information when the material is immediately available in the record, e.g., extraction of simple phrases and numerical data verbatim from records

Level II: Medical Assistant (Credentialed/Certified)**4678**

Under the direction of licensed healthcare professionals the medical assistant (credentialed/certified) enters orders into the health record systems for purposes of creating records for meeting the standards and objectives for Electronic Health Records (EHR) as consistent with Meaningful Use Core guidelines and/or similar regulations for medication, laboratory and radiology orders and/or consistent with healthcare facility protocols (federal, state and university) as directed by institutional requirements.

**Performs a variety of clinical and clerical tasks in an inpatient/outpatient clinical setting.

A Medical Assistant who is credentialed/certified typically performs the following duties per healthcare facility protocols (federal, state and university) and specific duties assigned -

1. Maintains medical records in Electronic Health Records (EHR) systems, reviews and prepares EHR to ensure completeness prior to patient exam, obtains missing documentation; documents medical visits, observations, and related activities
2. Performs direct patient care tasks such as the following:
 - a. responds to patient's telephone inquiries giving factual information according to the nature of the question; secures patient information about illness and health problems
 - b. greets patient, checks appointment, updates patient's information, demographics and insurance cards, and makes sure the patient's medical records are available to the physicians, nurse practitioners, or other healthcare providers
 - c. escorts or arranges to have patient escorted to examination or treatment room
 - d. completes and records patient's blood pressure, temperature, pulse, respiration, height, weight, measures baby's head circumference and other data on appropriate medical chart
 - e. discusses with the patient the reason for his/her visit and records symptoms on the chart
 - f. administers basic tests as designated by healthcare provider, such as EKG, spirometry, pulse oximetry, ear wash, Clinical Laboratory Improvement Amendments (CLIA), etc.
 - g. administers approved injections per appropriate protocol
 - h. instructs the patient in certain aspects of health care as directed by the physicians, nurse practitioners, or other healthcare providers
 - i. relays information to the patient regarding preparation for various types of exams and the location of laboratories, pharmacy, and other treatment areas

3. Assists physicians, nurse practitioners, or other healthcare providers with conducting diagnostic and therapeutic procedures, e.g., drapes patient for exams and treatments, sets up treatment tray to be used in an examination, holds and hands various instruments to the doctor, adjusts lights or treatment tables, procures proper IUD for patient insertion, applies or removes simple bandages or dressings, and removes stitches and/or staples after the site has been inspected by a physician, nurse practitioner, other healthcare providers or a clinic nurse
4. Performs in-direct patient care tasks such as the following:
 - a. per institutional direction, writes and/or enters orders into the EHR, following doctors' orders, requisitions of laboratory tests and procedures, such as medicines, laboratory, and radiology
 - b. dispatches messages to other departments and makes appointments for patients requiring services in other departments or healthcare facilities, as requested by the medical staff
 - c. collects and prepares patients' specimens and returns them to the laboratory for analysis; also provides necessary follow-up work, such as checking on test results
 - d. collects and bags soiled linen in the examining room; sets-up procedure rooms
 - e. cleans and sterilizes equipment and supplies and maintains appropriate cleaning logs per appropriate protocol
 - f. receives new supplies from supply source; checks supplies delivered against request for shortages and breakage; records errors or damages detected; places items in proper storage location in supply room; stocks examining rooms, insuring that appropriate medications and supplies are available at all times
 - g. obtains pre-authorizations and referrals
5. Participates or assists with initiatives to promote effective process design, development and implementation of EHR and other technologies; participates in improvement projects and on assigned committees
6. Performs clerical duties such as the following:
 - a. maintains patient files, medical records, treatment records, and laboratory results; completes patient charts as prescribed by physicians, nurse practitioners, or other healthcare providers
 - b. maintains records of monetary charges to patients and forwards them to the business office

- c. compiles periodic statistical reports from records and other data, such as clinic attendance, the number of patients seen by each doctor, and the discharge service analysis
- d. works with clerical support staff in sending out questionnaires, completing forms and organizing form letters to be sent
- e. provides routine request for patient information when the material is immediately available in the record, e.g., extraction of simple phrases and numerical data verbatim from records
- f. witnesses patient signature for universal consent

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Medical Assistant

4547

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent.
 2. Experience or training from the following categories:
 - a. one (1) year (12 months) of work experience and/or training which provided knowledge of clinical procedures and training in vital signs and patient prep for exams, sterilization and maintenance of instruments and equipment, and assisting with examinations and minor surgical procedures.
- OR**
- b. graduation from an accredited Medical Assistant program

KNOWLEDGE, SKILLS, AND ABILITIES (KSAs)

1. Knowledge of basic medical terminology
2. Knowledge of basic first aid principles, methods, and techniques
3. Knowledge of aseptic and sterilization techniques
4. Knowledge of inventory procedures
5. Knowledge of developing Electronic Health Records (EHR) and chart
6. Skill in the operation of sterilizing equipment
7. Skill in preparing case histories, reports, and records accurately and according to standard formulas

8. Willingness to, and skill in, dealing effectively with patients, hospital staff, and other persons from inside or outside hospital/clinic
9. Ability to make decisions based on urgency of the situation and in accordance with work procedures and hospital/clinic policies
10. Ability to follow oral and written instructions

Level II: Medical Assistant (Credentialed/Certified)**4678**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent.
2. Possession of a current/valid medical assistant certification by an approved certifying board as defined by the employing institution.

KNOWLEDGE, SKILLS, AND ABILITIES (KSAs)

1. Knowledge of basic medical terminology
2. Knowledge of basic first aid principles, methods, and techniques
3. Knowledge of aseptic and sterilization techniques
4. Knowledge of inventory procedures
5. Knowledge of Electronic Health Record (EHR) systems
6. Skill in the operation of sterilizing equipment and maintaining appropriate documentation records
7. Ability to make decisions based on urgency of the situation and in accordance with work procedures and hospital/clinic policies
8. Ability to follow oral and written instructions
9. Willingness to, and skill in, dealing effectively with patients, hospital staff, and other persons from inside or outside hospital/clinic
10. Ability to provide quality patient care and customer service

*Please note the significant difference in these two levels, per institutional direction, is the ability to enter appropriate laboratory and medical tests into designated electronic records as dictated by Meaningful Use Core guidelines and/or similar regulations as directed by institutional requirements.