

DACUM Research Chart for Medical Office Assistant

DACUM Panel Members **Imperial Valley Family Care Medical Group**

Lorena R. Mondragon
Medical Assistant Billing Clerk
Calexico, CA

Alice Serrano
Office Coordinator
Calexico, CA

Liz Velez
Medical Assistant
Calexico, CA

Gloria Gonzalez
Medical Assistant Supervisor
El Centro, CA

Robert Meza
Medical Assistant
El Centro, CA

DACUM Facilitator

Kathy Berry
Director, Nursing Education and Health
Technologies
Imperial Valley College
Imperial, CA

Produced By

Grossmont College **Leadership and Economic Development Institute**

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El Cajon, CA 92020

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DACUM Research Chart for Medical Office Assistant

Duties		Tasks			
A	Conduct Phone Triage	A-1 Answer phone calls	A-2 Take detailed messages	A-3 Sort phone messages by urgency	A-4 Dispatch phone calls to correct person
		A-5 Schedule patient appointments	A-6 Maintain patient confidentiality	A-7 Document phone call	A-8 Follow-through with phone calls (i.e., make sure concerns are addressed)
		A-9 Call patients with instructions/appointments	A-10 Return patient phone calls	A-11 Call pharmacy to fill patient prescriptions	A-12 Page physicians as needed
B	Prepare Patient Appointment Schedule	B-1 Print out daily appointment schedule	B-2 Prepare patient appointment list by time	B-3 Compare patient appointment time vs. "walk-ins"	B-4 Sort charts by appointment time
		B-5 "Fit in" walk-in patients into appointment schedule	B-6 Call patient to exam room by schedule		
C	Prepare Patient Charts	C-1 Have patient complete personal information sheet	C-2 Copy insurance/Medi-Cal or Medicare care	C-3 Verify eligibility of insurance/Medi-Cal/Medicare	C-4 Assign patient an account number
		C-5 Input patient information into computer	C-6 Create patient chart	C-7 Insert charge ticket (superbill) in front of chart	C-8 Complete patient information on "superbill"
		C-9 Collect patient's "co-payment" or fee	C-10 Place chart in rack/tray to be processed by M.A.		
D	Conduct Patient Appointment Triage	D-1 Check schedule for appointment time	D-2 Verify patient data for current information	D-3 Verify insurance data	D-4 Prepare patient chart of M.D./N.P./M.A.
		D-5 Verify previous lab reports	D-6 Review referral follow-up	D-7 Call patient into room	D-8 Obtain patient height and weight
		D-9 Take patients blood pressure	D-10 Take patients pulse and respirations	D-11 Take patient's temperature	D-12 Ask patient for chief complaint
		D-13 Ask patient about current meds/dosages	D-14 Ask patient about any additional forms that need to be completed		

E

Conduct "Walk-in" Patient Triage

E-1 Determine main complaint of patient	E-2 Determine urgency of complaint	E-3 Obtain patient's height and weight	E-4 Obtain patient's blood pressure
E-5 Take patient's pulse and respirations	E-6 Take patient's temperature	E-7 Notify physician of patient information	E-8 Refer patient to appropriate place as ordered
E-9 Prepare patient for exam by M.D./N.A./P.A.	E-10 Assist physician with exam	E-11 Fill lab orders	E-12 Refer patient to specialist as ordered
E-13 Give instructions to patient/family	E-14 Send to front desk for follow-up appointment		

F

Prepare Patient For Exam

F-1 Have patient change into a gown	F-2 Explain exam procedure to patient	F-3 Place patient on bed/table for exam	F-4 Assist M.D./N.P./M.A. with exam
F-5 Translate exam procedures to patient	F-6 Fill lab orders	F-7 Follow physician orders	F-8 Instruct patient as ordered by physician on procedures
F-9 Send patient to front desk for follow-up appointment			

G

Assist M.D./ N.P./ P.A. with Patient Exam

G-1 Place exam procedure supplies on try	G-2 Stand next to patient	G-3 Assist patient to relax	G-4 Follow M.D. instructions
G-5 Assist M.D. with procedure/exam as required	G-6 Give patient discharge orders	G-7 Assist patient with dressing	G-8 Send patient to front desk for follow-up appointment

H

Perform Medical (uncomplicated) Procedures

H-1 Check physician orders for given task	H-2 Gather supplies for procedure	H-3 Prepare work area	H-4 Prepare patient for procedure
H-5 Follow OSHA/Infection Control guidelines	H-6 Explain procedure to patient	H-7 Perform procedure (or) assist physician with procedure	H-8 Clean patient after procedure
H-9 Give patient discharge instructions	H-10 Clean/disinfect room	H-11 Document procedure in chart	

I

Administer Medication to Patient(s)

I-1 Obtain patient history regarding allergies	I-2 Double-check physician orders	I-3 Instruct patient on procedure	I-4 Put on protective gloves
I-5 Prepare medication for administration	I-6 Prepare injection site	I-7 Administer medication	I-8 Discard "dirty" needle in proper container
I-9 Instruct patient on medication side effects	I-10 Observe patient for app. 20 min. for complications	I-11 Document medication administration site and results	I-12 Discharge patient with instructions

J

Administer Immunizations

J-1 Prepare patient charts for height and weight	J-2 Began immunization history of patient	J-3 Obtain height, weight, and head circumference f pediatric patient	J-4 Get medical history from parent
J-5 Call in doctor to talk with parent	J-6 Translate for doctor as needed	J-7 Check doctor's orders regarding patient	J-8 Prepare vaccines for patient
J-9 Education parent or patient regarding procedure	J-10 Give immunization injection	J-11 Document immunizations administered	J-12 Send to front desk for follow up appointment

K

Perform Blood Withdrawals

K-1 Determine what tests are needed	K-2 Complete lab order slips	K-3 Verify patient's insurance information	K-4 Verify correct status of patient
K-5 Gather supplies for procedure	K-6 Explain procedure to patient	K-7 Assess how patient will handle lab procedure	K-8 Put patient in appropriate position
K-9 Look for the vein on patient's arm	K-10 M.A. puts on gloves	K-11 Swab the procedure site	K-12 Place tourniquet on patient's arm
K-13 Insert needle in vein	K-14 Collect blood specimen	K-15 Remove needle from patient's arm	K-16 Remove tourniquet from the arm
K-17 Apply pressure to stop bleeding	K-18 Place band-aid on stick site	K-19 Educate patient on what to expect from procedure	K-20 Label patient's blood specimen
K-21 Process patient's blood specimen			

L

Clean Patient Exam Room

L-1 Gather cleaning supplies	L-2 Wipe exam table with disinfectant	L-3 Replace table paper on exam bed	L-4 Change pillow cases
L-5 Restock supplies in room	L-6 Stock towels and soap in each room	L-7 Spray disinfectant in room	L-8 Empty biohazard bins as needed
L-9 Stock gloves in each exam room			

M

Referrals of Patients to Office

M-1 Obtain chart from M.D./N.P./P.A.	M-2 Review patient insurance for facility and physician contract and eligibility	M-3 Obtain insurance authorization if required	M-4 Call doctor and/or facility to schedule an appointment
M-5 Provide patient data, orders, diagnosis to referring M.D./Facility	M-6 Fax "last notes" order/Rx to referring M.D./Facility	M-7 Notify patient of appointment day and time	M-8 Give patient discharge instructions
M-9 Make a copy of doctor's orders	M-10 Document referral information on patient chart	M-11 Place chart to be filed	

N

Maintain Medical Records

N-1 Medical reports reviewed by M.D.	N-2 Collect reviewed medical reports from M.D./N.P./P.A.	N-3 Alphabetize all reports	N-4 Pull patients charts
N-5 File appropriate documents in proper divider	N-6 File patient's chart		

O

Conduct ICD-9 and CPT Coding

O-1 Collect daily superbills on patients	O-2 "Batch" superbills by date and doctor	O-3 Verify superbills by daily patient sheets	O-4 Highlight ICD-9 and CPT codes in chart
O-5 Enter additional CPT codes	O-6 Enter total doctor charges per patients	O-7 Total all charges per doctor	O-8 Send superbills to corporate office for billing

P

Prepare Daily Deposits

P-1 Balance daily money received	P-2 Prepare payment control sheet by doctor	P-3 Document patient's name, doctor, date, type of payment, and amount received	P-4 Separate cash from checks
P-5 Total monies per doctor	P-6 Fill out batch transmittal slip	P-7 (Endorse) stamp all checks with bank information	P-8 Place checks and money with batch transmittal slips and payment control sheets per doctor
P-9 Send all deposits to corporate office			

Q

Maintain Surgical Instruments

Q-1 Gather used instruments	Q-2 Wash used instruments	Q-3 Soak instruments in germicidal solution	Q-4 Dry (air dry) instruments
Q-5 Wrap/bag instruments for sterilization	Q-6 Date, label, and initial bag/wrap	Q-7 Fill autoclave with distilled water	Q-8 Place instruments in autoclave
Q-9 Turn on timer and autoclave	Q-10 Log sterilization process	Q-11 Remove instruments after cooling	Q-12 Store instruments in appropriate area

R

Perform Office Maintenance

R-1 Check equipment in exam rooms	R-2 Check oxygen tank gauges for tank fullness	R-3 Check refrigerator temperature & record on log	R-4 Calibrate medical equipment
R-5 Replace fax and copy paper	R-6 Replace malfunctioning equipment	R-7 Call repair person when needed	R-8 Check autoclave log spore test
R-9 Make sure coffee & coffee pot are functioning	R-10 Check office, exam rooms for cleanliness		

S

Inventory Supplies

S-1 Verify quantities of supplies against control sheet	S-2 Check for expiration dates	S-3 Complete order list	S-4 Get M.D. approval for order list
S-5 Order supplies from appropriate company	S-6 Receive shipment of supplies	S-7 Cross-reference supplies received with order	S-8 Stock supplies in appropriate place
S-9 Submit invoice slip to administrator			

T

Supervise Office Staff/Medical Assistant

T-1 Orient new staff	T-2 Explain/enforce rules and regulations of M.A.'s	T-3 Prepare work schedules/make assignments	T-4 Delegate job duties
T-5 Keep log of total hours per staff member	T-6 Conduct inservices and training for new staff	T-7 Conduct employee yearly evaluations	T-8 Develop work schedule
T-9 Oversee M.A. job duties	T-10 Interview potential (new) employees	T-11 Hire new employees	

Future Trends and Concerns

- 2003 - Requires certification to work in office
- Continuing education requirements
- Inadequate patient care
- Insurance requires certification
- Insurance/cost containment
- M.A. is a growing field
- Politics interfering with patient care
- Use of computer (replacing people)

General Knowledge and Skills

- Accounting experience
- Be able to write legibly
- C.P.R. Certified
- Certified Medical Assistant
- Computer skills
- Phlebotomist (certified)
- Type

Tools, Equipment, Supplies and Materials

- Black ink pens
- Blood pressure cuff
- Computer/PC
- Exam table
- Note pads
- Phone/Fax
- Protective equipment (i.e., gloves, mask)

- Shoes (appropriate)
- Stethoscope
- Surgical equipment
- Thermometer
- Uniform
- Watch with second hand

Worker Behaviors

- Confidentiality
- Cautious
- Dependable
- Efficiency
- Empathy
- Experienced
- Good communication skills
- Good customer service
- Good judgment skills
- Good personal hygiene
- Knowledge of office equipment
- Maintain patient
- Must have common sense
- Neatness
- Organized
- Patience
- Phone etiquette
- Professional
- Punctual
- Teamwork
- Translate
- Work readiness

