

DACUM Competency Profile for Medical Assistant

A Medical Assistant (MA) is one who works under the direction of the healthcare provider (e.g., physician, NP, PA) to facilitate total patient care.

Duties		Tasks								
A	Perform patient Intake	A-1 Initiate first patient contact	A-2 Verify patient information	A-3 Verify insurance eligibility and benefits	A-4 Adhere to administrative HIPAA Policy	A-5 Review completed administrative consent forms	A-6 Assemble patient records	A-7 Schedule patient appointments		
B	Manage Administrative Operations	B-1 Perform routing triage to clinical personnel or support staff	B-2 Update patients regarding appointment wait time	B-3 Collect payments	B-4 Perform billing operations	B-5 Obtain prior authorization for medications and procedures	B-6 Manage office correspondence	B-7 Maintain office equipment	B-8 Order office supplies	
C	Maintain Patient Electronic Health Records	C-1 Maintain system security	C-2 Update health maintenance information	C-3 Update health history	C-4 Import patient data/information (e.g., labs, imaging, consults)	C-5 Document patient self-monitoring information	C-6 Export patient data/information (e.g., report, e-prescription)	C-7 Coach co-workers with electronic health record implementation	C-8 Update status of Meaningful Use Measures	
D	Prepare Patient for Medical Appointment	D-1 Verify patient identification	D-2 Obtain chief complaint	D-3 Prioritize patient care	D-4 Obtain patient past medical history	D-5 Document current medication list	D-6 Document allergies	D-7 Obtain patient social history	D-8 Maintain patient privacy	D-9 Obtain and record mental status information
		D-10 Obtain and record abuse information	D-11 Obtain and record specialty-specific information	D-12 Collect specimens	D-13 Obtain pre-operative clearance information	D-14 Facilitate health care interpretation	D-15 Obtain prior medical records	D-16 Verify advance directive information		

E	Maintain Standard Precautions	E-1 Adhere to hand hygiene policy	E-2 Utilize personal protective equipment	E-3 Follow patient Standard Precautions protocol	E-4 Sterilize instruments	E-5 Sanitize patient care area	E-6 Perform restroom maintenance	E-7 Sanitize waiting room	E-8 Implement sharps disposal per OSHA	E-9 Implement biohazard waste disposal per OSHA
		E-10 Perform N-95 fit-testing								
F	Perform Patient Clinical Procedures	F-1 Measure and record appointment-specific vital signs	F-2 Conduct visual acuity test	F-3 Conduct color vision testing	F-4 Conduct peripheral vision testing	F-5 Perform eye wash	F-6 Conduct tympanometry	F-7 Conduct audiometry	F-8 Perform ear lavage	F-9 Perform EKGs
		F-10 Set up Holter Monitor	F-11 Monitor pulse oximetry	F-12 Perform spirometry	F-13 Perform venipuncture	F-14 Perform wound care	F-15 Apply temporary orthopedic devices	F-16 Administer vaccines	F-17 Administer TB skin test	F-18 Perform allergy testing
		F-19 Perform specialty-specific procedures	F-20 Adhere to clinical HIPAA policy	F-21 Document clinical procedures performed	F-22 Perform diabetic foot screening	F-23 Perform suture or staple removal				
G	Perform CLIA-Waived Procedures	G-1 Perform urinalysis	G-2 Perform finger stick blood glucose test	G-3 Perform finger stick hemoglobin A1C test	G-4 Perform Pregnancy Test (HCG)	G-5 Perform finger stick lipid tests	G-6 Perform throat Rapid Strep test	G-7 Perform Hemoglobin & Hematocrit tests (H & H)	G-8 Perform finger stick PT/INR tests	G-9 Perform erythrocyte sedimentation rate (ESR) test
		G-10 Perform fecal occult blood test	G-11 Perform mononucleosis test	G-12 Perform respiratory syncytial virus (RSV) test	G-13 Perform drug screen tests	G-14 Perform Rapid Influenza A & B test				

H	Assist with Clinical Procedures	H-1 Assist with patient emergencies	H-2 Obtain completed clinical consent form	H-3 Prepare patient for procedure	H-4 Set up trays for various procedures	H-5 Assist with physical exam	H-6 Identify body site for procedure	H-7 Assist with catheter placement and removal	H-8 Assist with laceration repair	H-9 Assist with burn care
		H-10 Assist with x-ray positioning	H-11 Assist with PAP test and pelvic exams	H-12 Assist with rectal exam	H-13 Assist with I & D (incise and drain) abscess	H-14 Assist with diabetic nail care	H-15 Assist with toe nail removal	H-16 Assist with IVs	H-17 Assist with skin lesion treatment	H-18 Assist with removal of foreign body
		H-19 Assist with specialty procedures	H-20 Assist with cardiac stress test	H-21 Assist with casting and orthotics	H-22 Assist with circumcisions	H-23 Assist with biopsy	H-24 Assist with colonoscopy	H-25 Assist with flexible sigmoidoscopy	H-26 Assist with pediatric exam	
I	Administer Medications	I-1 Administer ophthalmic medications	I-2 Administer nasal medications	I-3 Administer otic medications	I-4 Administer oral medications	I-5 Perform nebulizer treatments	I-6 Administer therapeutic injections	I-7 Administer topical medications	I-8 Administer suppositories	I-9 Administer oxygen
J	Provide Patient Education	J-1 Review care plan with patient	J-2 Clarify medical terminology in laymen's terms	J-3 Relay test results	J-4 Provide medication information	J-5 Follow-up with patient post appointment (after visit summary)	J-6 Provide vaccine information	J-7 Explain medical procedures	J-8 Provide wound care instruction	J-9 Provide adaptive equipment instruction
		J-10 Provide clinical equipment instruction	J-11 Provide post injury education	J-12 Provide chronic disease education (Diabetes, HTN, CV)	J-13 Provide therapeutic diet information	J-14 Explain therapeutic exercises	J-15 Provide health and wellness education	J-16 Provide nutritional education	J-17 Provide information on complementary medicine	
K	Facilitate Operational Communication	K-1 Perform operational huddle	K-2 Perform clinical huddle	K-3 Maintain internal electronic messaging	K-4 Manage incoming and outgoing patient messaging	K-5 Coordinate communication with external providers/ ancillary services				

L	Manage Clinical Operations	L-1 Follow up on referrals	L-2 Schedule specialty procedures	L-3 Coordinate care with specialists	L-4 Relay prescription information to pharmacy	L-5 Follow up with patient post procedure	L-6 Verify accuracy of coding on encounter forms	L-7 Audit patient medical record for completeness	L-8 Monitor expiration dates of medications and equipment	L-9 Maintain clinical supply inventory
		L-10 Order medications and vaccines	L-11 Order medical supplies	L-12 Maintain patient room supplies	L-13 Maintain crash cart	L-14 Maintain clinical equipment	L-15 Maintain quality assurance logs	L-16 Maintain security of prescription pads and narcotics	L-17 Manage pharmaceutical representatives	L-18 Perform laundry service
M	Maintain Professional Responsibilities	M-1 Maintain ethical standards	M-2 Adhere to current documentation standards	M-3 Perform within legal scope of practice	M-4 Maintain professional certifications (BLS, RMA, CMA, CPT, etc.)	M-5 Participate in continuing education	M-6 Participate in hiring panels when hiring other MAs	M-7 Train new employees	M-8 Supervise employees	M-9 Participate in professional organizations
		M-10 Precept students								
N	Assume Enhanced Roles/Responsibilities	N-1 Achieve “Super User” status for electronic health records	N-2 Become a “Train-the-Trainer” for new technologies	N-3 Participate as a community liaison	N-4 Advocate for the patient	N-5 Serve on professional/organizational committees	N-6 Perform Safety Coordinator duties	N-7 Achieve Health Care Interpreter certification	N-8 Assume departmental leadership role	N-9 Participate in continuous performance improvements
		N-10 Assist with patient navigation								

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MEDICAL ASSISTANT

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Acronyms/Abbreviations Used

ACLS: Advanced Cardiac Life Support	INR: International Normalized Ratio
AED: Automatic External Defibrillator	IPA: Independent Practice Association
BiPAP: Biphasic Positive Airways Pressure	IV: Intravenous
BLS: Basic Life Support	LEEP: Loop Electrosurgical Excision Procedure
CAIR: California Immunization Registry	LVN: Licensed Vocational Nurse
CDP: Cancer Detection Program	MA: Medical Assistant
CHDP: Child Health and Disability Prevention	Medi-Cal: Medicaid program in California
CLIA: Clinical Laboratory Improvement Amendments	MI: Myocardial Infarction
COI: Certificate of Insurance	MSDS: Material Safety Data Sheets
CMA: Certified Medical Assistant	OSHA: Occupational Safety & Health Administration
CPAP: Continuous Positive Airway Pressure	PALS: Pediatric Advanced Life Support
CPR: Cardiopulmonary Resuscitation	PCMH: Patient Centered Medical Home
CPT: Current Procedural Term	PCP: Primary Care Provider
CPT: Certified Phlebotomy Technician	PFT: Pulmonary Function Test
CV: Cardiovascular	PICC: Peripherally Inserted Central Catheter
DHS: Department of Health Services	POCT: Point of Care
DPH: Department of Public Health	PPO: Preferred Provider Option
EHR: Electronic Health Record	PPE: Personal Protective Equipment
EKG: Electrocardiogram	PT/INR: Prothrombin Time/International Normalized Ratio
EMR: Electronic Medical Record	RMA: Registered Medical Assistant
FAM PACT: Family Planning Access to Care and Treatment	RN: Registered Nurse
HCG: Human Chronic Gonadotropin (pregnancy test)	SBAR: Situation-Background- Assessment- Recommendation
HIPAA: Health Insurance Portability and Accountability Act	SCA: Sudden Cardiac Arrest
HIT: Health Information Technology	TAR: Treatment Authorization Request
HIV: Human Immunodeficiency Virus	TB: Tuberculosis/PPD (Purified Protein Derivative)
HMO: Health Maintenance Organization	VFC: Vaccine For Children
HTN: Hypertension	
ICD: International Classification of Diseases	

Worker Characteristics and Behaviors

Accountability	Listening skills
Anticipatory vision	Marketing/selling services
Caring	Motivated
Change agent	Multi-tasker
Community outreach	Open partnering with providers/ MD Patient
Compassionate	Patient-centered
Conscientious	Patient/Staff Advocate
Disciplined	Positive role model
Doesn't set limits on self (willing to jump in)	Proactive, action-oriented
Emotional intelligence	Problem-solver
Empathy	Professional
Enjoy what they do	Reliability
Ethical	Respectful
Family-centered	Responsible
Flexible	Self-motivated
Forward-thinking	Sense of humor
Good communicator at various levels	Staff motivator
Good time management skills	Teacher
Hardworking	Team player
Holistic approach	Trustworthy
Honest	Visionary
Innovative	Wanting and doing more than is expected
Integrity	Willing to learn
Knows boundaries	Willing to teach
Knowledgeable	Work ethic
Leadership	

Future Trends

Increased technology	Concierge medicine/ more accessibility
More office procedures vs. hospital	More patient education
Multi-lingual offices	Holistic care
Flexible office hours	ICD-10
Increase of government control of healthcare cost	Changes in pharmacology
Increased educational requirements of Medical Assistants	Interfacing EHR
Mandatory certification	Increased computer skill level
Team-based care	Increased number of patients
Shift to preventive medicine/treatment	PCMH
Increased use of complementary care	Increased number of standardized procedures
Return/different strains of pathogens	Open/advanced access
Changes in antibiotic use/misuse/overuse	Patient Navigation Center
More computerized medical records	Implementation of Affordable Care Act

Tools, Equipment, Supplies, and Materials

Business & Front Offices

Alphabetical/Numerical sorter
Answering Service
Appointment Book
Appointment Cards
Calculator
Charts/dividers/labels
Clipboard
Clock
Computer
Credit Card Machine
Date stamper
Daysheets (If office not computerized)
Dictaphone
Emergency lighting
Envelopes (various sizes)
Fax
File Cabinets
Flash Light
Forms (HCFA billing/health history/new patient)
General Ledger (If office not computerized)
HIPPA Form
Internet Access
Labels
Letterhead
Manila file folders
Markers
MSDS (material safety data sheets)
Office Furniture
Paper
Paper Clips
Paper Cutter
Paper Punch
Paper Shredder
Pens
Pencils
Pencil Sharpener
Photocopier
Policies and Procedure manual
Post-it-notes
Postal Machine and Meter

Printers

Reference Books:

-Gray's Anatomy
-ICD-10-CM (International Classification of Diseases, 10th Revision Clinical Modification)
-CPT (Current Procedural Terminology)
-HCPCS (Healthcare Common Procedure Coding System)
-HCFA (Health Care Financing Administration)
-PDR (Physician's Drug Reference)
-Medical Dictionary

Scissors

Software (Billing, AP/AR, Word Processing)

Stapler/staples

Tacks

Tape

Telephone

Telephone directory

Telephone message pads

General Housekeeping Supplies

Bleach

Broom

Cleaning supplies

Disinfectant

Dust pan

Dust cloth

Lotion

Mop

Paper towels

Scrub brushes

Soap

Sweeper

Toilet brush

Toilet paper

Toilet seat covers

Back Office

Ace bandages
Alcohol
Alcohol wipes
Ambu-Bag
Anal basins
Anal scope & Supplies
Audiometry equipment
Autoclave/tape/bags
Band-aids
Bedpan
Betadine
Bio-hazardous/hazardous waste containers
Blood glucose monitor/Test strips
Breathalyzer
Butterfly needles
Casting materials
Cast removal machine
Catheters/urinary
Centrifuge
Chemical sterilant
Chemical/thermal packs
Chux
Circumcision board
Colonoscope
Cotton balls
Cotton tip applicators
Crash cart
Crutches
Cultures (bacterial/viral)
Dermabond
Diapers
Digital camera
Diluent solution
Diluent water
Doppler Monitor
Dosimeter
Drainage tube
Drapes/gowns/capes
Dressing supplies/wound packing supplies
Drugs & solutions
Drug screening equipment
Dysol (Aluminum Chloride)
EKG machine/supplies
Electro-cautery
Emergency lighting
Emesis basin
Endocervical currettes
Examination table/chair
Eye occluders
Flash light
Fleet enemas
Foot cradle
Formalin
Gauze/tube/pads/sterile
Germicide solution
Gloves/sterile/utility
Gram stain supplies
Gurney
Head/hand mirror
Fecal occult blood test supplies
Hemoglobin A1C machine/kit
Highlighters
Hot packs
Hydrogen peroxide
Ice packs
Irrigation tray
Ishihara color plates
Lab slides/cover slips
Labels
Lancet
Laryngeal mirror
Lights
Linens
Lubricant
Kidney basin
Marking pens for skin
Masks/caps
Medication cups
Microcapillary hematocrit tubes
Microscope
Mono Spot Test Kits
MSDS (Material Safety Data Sheets)
Nasal scopes
Non-rebreather mask
Normal saline
Ophthalmoscope
Otoscope/otoscope sheaths
Oxygen/tank/masks/tubing
Pap light
Pap smear fixative
Pap smear kit
Paper
Paper clips
Paper punch
Paper sheeting for exam table
Patient gowns
Peak flow meter
Pencils
Pens
Phenol solution
Pillows/pillow case covers

Back Office (continued)

Pipette
Pocket mask
Podophyllin solution
Polaroid camera
Policies & procedures manual
Post-it-notes
Potassium hydroxide
Pregnancy test kits
Prescription pads
Protective wear (gowns/masks/face shields/goggles)
PT INR machine
Pulmonary nebulizer
Pulse oximeter
Punch biopsy kit
Rapid strep kit
Razors
Reference books
Reflex hammer
Refrigerator/freezer
Refrigerator thermometer
Sanitary napkins
Scale adult & baby
Scissors
Secure shredder container
Sharps container
Sigmoid scope
Silvadene
Slings
Snellen chart/ eye chart
Speculums
Sphygmomanometer
Spirometer
Splints/braces
Staples/staple remover
Sterile water
Sterile wrap (autoclave)
Steristrips
Stethoscope
Suction equipment/instruments
Surgical instruments
Surgical tape
Suture removal equipment
Sutures
Syringes/needles
Tape measure
Telephone
Telephone directory
Telephone message pads
Thermometer (Toral/rectal/aural/temporal)
Thermometer sheaths
Timer
Tincture of Benzoin
Tongue depressors
Tourniquets
Towels
Trach tubes
Trash cans
Tube gauze and applicator
Tubex syringe holders
Tympanometer
Urinalysis dipstick machine
Urine cups
Urine dipstick
Vacutainer (needles/tubes)
Walkers
Watch
Waterpik/ear syringe
Wheel chair

General Knowledge and Skills

Skills/Knowledge

Accounts Payable
Accounts Receivable
Anatomy and Physiology
Available healthcare resources
Banking/check writing
Basic math skills
Basic computer skills
Basic psychology
Bookkeeping skills
CLIA (Clinical Laboratory Improvement Amendment) regulations
Clinical procedures
Critical thinking
CPR- BLS
CPT-4 (Current Procedural Terminology, 4th edition)
Documentation/forms
Durable power of attorney
Electronic medical billing
Emergency protocols
Ethics
Gender/cultural diversity
HCPCS common procedure coding system
HCFA's Health Care Financing Administration
HIPAA
ICD-10-CM (International Classification of Diseases, 10th Revision Clinical Modification)

Insurance
Insurance terminology
Joint Commission
Leadership skills
Legal issues/aspects of healthcare
Mandated reporting
Medical terminology
New equipment
Organization principles
OSHA regulations
Pathophysiology
Patient education skills
PDR (Physicians' Desk Reference)
Pharmacology
Policies and procedures
Problem-solving
Scheduling
Scope of practice/state regulations
Standard procedures of infection control
Sterile technique
Stress management
Telephone and email etiquette
Time management skills

Certifications

CPR-Cardiac Life Support
CCMA- California Certified Medical Assistant
CMA (AAMA) – Certified Medical Assistant
RMA- Registered Medical Assistant
PFT- Pulmonary function testing
Phlebotomy

Specialties

Internal Medicine
Cardiology
Drug and Alcohol
Sports Medicine
Gastroenterology
Occupational medicine
Physical Therapy
Neurology
Pediatrics
Women's Health
Endocrinology
Oral Surgery
Urology
Ophthalmology
Orthopedics
Plastic surgery
Podiatry
Ear Nose Throat
Nephrology
Corrections/ prison healthcare
Infectious Disease
Minor Surgery
General Surgery
Breast Care
OB/GYN
Dermatology
Geriatrics
Oncology
Pulmonology