

**MEDICAL ASSISTANT  
(Time-Based)**

**APPENDIX A**

O\*NET CODE: 31-9092.00

This training outline is a minimum standard for Work Processes and Related Instruction. Changes in technology and regulations may result in the need for additional on-the-job or classroom training.

**WORK PROCESSES**

	<b>Approximate Hours</b>
<b>A. Workplace Orientation</b>	<b>100</b>
<ol style="list-style-type: none"><li>1. Learn and follow employer-specific policies, procedures, safety protocols, etc.</li><li>2. Demonstrate an understanding of the healthcare environment and a Medical Assistant (MA) role in the industry. Demonstrate an understanding of the scope of practice for nursing roles [i.e., licensed practical nurses (LPN), registered nurses (RNs)], and providers [i.e., physicians, nurse practitioners (NPs), and physician assistants (PAs)], and how MAs collaborate with other clinical staff including LPNs, RNs, NPs, PAs, and physicians.</li><li>3. Participate in Health Insurance Portability and Accountability Act of 1996 (HIPAA) training; employ HIPAA Rules regarding privacy and security.</li></ol>	
<b>B. Patient Care</b>	<b>900</b>
<ol style="list-style-type: none"><li>1. Conduct review of scheduled patient(s)' chart or Electronic Medical Record (EMR) to assist with pre-visit planning as assigned by supervisor.</li><li>2. Conduct rooming process including the following tasks: interview patients; measure vital signs, including weight, blood pressure, pulse, temperature; and document all information in patient's electronic chart.</li><li>3. As assigned, act as a scribe and enter history and physical information, chief complaint(s), medication(s), allergy (-ies), and family history into the EMR and assist patients in filling out self-report questionnaire.</li><li>4. Assist provider during visit with examinations and procedures. Provide direct patient care in accordance with plan of care,</li></ol>	

including appropriate handoff and referral of patient to appropriate internal support services (i.e., case manager, health educator, nutritionist, etc.) as per instructions.

5. Assist, as needed, in primary care practices providing specialty care (i.e., OB/GYN, podiatry, etc.).
6. Process diagnostic orders as per provider request and follow up with patient(s') results via proper protocol.
7. As per provider request review EMR for up-to-date immunizations, problem list and other required documentation, including diagnostic test results and specialty referrals in coordination with tracking and referrals department.
8. As per provider request perform electrocardiograms (ECGs/EKGs).
9. Collect and prepare laboratory specimens and transcribe results without assessing or interpreting for the following (interpretation and assessment by licensed provider):
  - a. Urine dipsticks;
  - b. Phlebotomy, if properly trained and in a Clinical Laboratory Improvement Amendment (CLIA)-waived facility;
  - c. Finger sticks;
  - d. Cheek swabs;
  - e. Throat swabs;
  - f. Superficial cultures;
  - g. Perform basic hearing and vision tests.
10. Provide prepared health education resources, and instruction as directed by the provider.
11. Facilitate lab and diagnostic tests at the request of the ordering provider.
12. Maintain exam rooms according to employer-specific policies. Sanitize rooms and equipment between patients to ensure infection control standards are maintained. Ensure all necessary supplies are stocked and equipment is functioning properly.
13. Thoroughly record information in the EMR to meet clinical and agency requirements.
14. Facilitate infection control by utilizing and maintaining sterilization equipment per manufacturer's recommendation. Perform autoclave testing and maintain an autoclave test log as directed by supervisor.

### **C. Administration Procedures**

**800**

1. Schedule and reschedule patient appointments over the telephone and in-person; and if requested by provider or supervisor schedule follow up visits at the end of the initial patient appointment.
2. As needed, or as per the request of supervisor, coordinate reception/front office operations duties: Greet and register all patients as they arrive, perform insurance verification/preparation, schedule appointments, answer calls, take messages and other similar clerical tasks.
3. Adhere to front desk protocol for patient flow.
4. Provide clinical visit summary to patients at check-out, as appropriate.
5. Assist with monitoring emergency supplies such as oxygen tanks, defibrillator pads and battery, emergency medication boxes. Promptly report malfunction, missing, or damaged equipment to the nursing administration.
6. Ensure and maintain an adequate inventory of all necessary supplies, including medical equipment, forms and other inventory that might be appropriate or required by the provider or supervisor.
7. Liaise with provider to complete various patient forms such as insurance claims, disability forms, medication approvals, etc.
8. As needed, or as per the request of supervisor, coordinate check-out process, including scheduling follow-up appointments, processing referrals, radiology, transportation, prior approvals, etc.
9. As needed, or as per the request of supervisor, confirm next-day appointments; follow up on missed appointments with call/letters per employer-specific policy and document results in EMR.
10. Refer patients with health insurance needs to insurance specialists.

### **D. Laboratory Procedures**

**200**

1. As assigned demonstrate responsibility for assigned lab functions: act as clinic liaison for lab issues, replenish lab supplies, and perform infection control processes, etc.
2. As assigned collect and process specimens for laboratory testing and complete necessary paperwork or electronic documentation.
3. Obtain and maintain integrity of specimens (when applicable as per rendering provider orders).

**Approximate Total Hours            2000**

*Apprenticeship work processes are applicable only to training curricula for apprentices in approved programs. Apprenticeship work processes have no impact on classification determinations under Article 8 or 9 of the Labor Law. For guidance regarding classification for purposes of Article 8 or 9 of the Labor Law, please refer to <https://dol.ny.gov/public-work-and-prevailing-wage>*

**MEDICAL ASSISTANT**  
**APPENDIX B**  
**RELATED INSTRUCTION**

**Safety, Health, and the Workplace**

1. First Aid (minimum 6.5 hours)
2. Infection Control
3. All Applicable Occupational Safety & Health Administration (OSHA) Regulations, Standards and Rules
4. Equipment Safety Operation Practices
5. Occupational Health and Safety Techniques following the Centers for Disease Control and Prevention Guidelines
6. HIPAA and Confidentiality
7. Sexual Harassment Prevention Training – must comply with section 201-g of the Labor Law

**Job Skills and Theory**

1. Anatomy and Physiology
  - a. Fundamentals
  - b. Gross Anatomy
  - c. Physiology – Organ Systems Functions
2. Clinical Testing
  - a. Vital Signs
  - b. Basic Hematology
  - c. Basic Microbiology
  - d. Phlebotomy Procedures
  - e. EKG Procedures
  - f. Urinalysis
  - g. Physician Examinations (Assisting)
3. Administrative Procedures
  - a. Patient History
  - b. Filing, Typing
  - c. Scheduling
  - d. Accounting/Bookkeeping

- e. General Office Procedures
- f. Insurance/Third Party Reimbursement
- 4. Medical Terminology
  - a. Usage
  - b. Spelling
  - c. Introduction to Pharmacology

**Other Related Topics as Necessary**

A minimum of 144 hours of Related Instruction are required for each Apprentice.

Appendix B topics are approved by New York State Education Department.