

**TRAVERSE HEALTH CLINIC  
ADULT AND PEDIATRIC CLINICAL SKILLS CHECKLIST**

**NAME:** \_\_\_\_\_

**PRECEPTOR(S):** \_\_\_\_\_

**Key: Method**

**A. Actual Performance**

**D. Demonstration**

**O. Oral Review**

**R. Read**

**E. Educational Module**

**V. Viewed video**

**Key: Results**

**M. Meets expectations**

**N. Needs Improvement**

**NA. Not Applicable**

Task	Date Completed	Method	Results	Comment	Preceptor Initials
<b>Vital Signs/Rooming</b>					
Blood Pressure, manual <sup>2</sup>					
Head Circumference					
Height - Adult					
Length - Child					
Pulse -- Radial					
Pulse Oximetry (resting, walking)					
Respirations					
Temperature - Oral					
Temperature - Rectal					
Waist Circumference					
Weight - Adult					
Weight - Child					
Weight- Infant					
<b>Documentation</b>					
Chief Complaint/Interval History Adult (hx imms?)					
Interval History Child (hx imms?)					
Medication Reconciliation (name, dose, frequency) -- refills?					
Allergy Assessment					
Last Menstrual Period					
Vitals (including vision)					
<b>Procedures</b>					
Ace Wrap (elastic bandage) <sup>2</sup>					
Fingerstick specimen collection					
Clean Catch Midstream Urine (label w/pt & prov initials)					
Clean Field Set-up (skin tag, shave biopsy) <sup>5</sup>					
Diabetic Foot Exam					
Dressing Change					
Ear Irrigation/Drops <sup>1</sup>					
EKG/Midmark and cleaning					
Hyfrecator set up and use					
Eye Drops					
IUD insertion/removal setup <sup>5</sup>					
Genesight Testing and Ordering					
Lab Specimen prep for pickup					
Medication admin. Oral					
Medication admin. Topical					
Metered Dose Inhaler, spacer education					
Nebulizer Treatments (pre- and post-tx SpO2, pulse)					
Nexplanon insertion/removal set up <sup>5</sup>					
Oxygen Administration (tubing, turn on/shut off, flow rate)					
Pap/Pelvic Exam Set-up					
Peak Flow Meter Use					
Staple Removal					
Sterile Field Set-up (sutures, excision, biopsy) <sup>5</sup>					
Steri-strips					

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Suture Removal					
Swab for RSV/Sendout Flu Test					
Urine Drug Screen (BluRapids, RHB)					
Urine for STD Collection ("dirty urine") -- voiding rules <sup>6</sup>					
Venipuncture/phlebotomy					
Vision Chart - Adult					
Vision Chart- Child					
Wet Prep/KOH Set-up					
<b>Point of Care Lab Testing</b>					
BluRapids/UDS					
Fecal Occult Blood					
Fingerstick Blood Sugar					
HCG Urine Pregnancy					
Hemoglobin					
Hemoglobin A1c					
Lab Quality Control Procedures for CLIA waived tests					
Nasopharyngeal Swab for Rapid Flu					
Throat Swab for Rapid Strep					
Urine Dipstick					
<b>Other</b>					
** Acute, Walk in, new pt, chronic, same day urgent					
**screening vs. diagnostic Mamm, 3D, Mamm I, Title XV					
**Sports PE, Welcome to Medicare, CPE, re-establish, Well Child					
**US, PFT/Spirometry, CT , MRI -- creatinine needed?					
Asthma Smart Form (ACT)					
Closing procedures					
COPD questionnaire					
Follow-up Phone calls, labs, other with documentation					
Handwashing/Infection Control/Universal precautions					
HRA form documentation					
Instrument Cleaning and Sterilization					
Internal Referrals					
MAPS Reports (controlled medication prescription)					
MCIR (immunization records)					
Med Access Process (PAP, samples) -- documenting					
Medical Emergency Procedure/Supplies (Narcan, oxygen, AED <sup>1</sup> )					
Ordering and scheduling DI with and w/o PWS					
Ordering Diabetic Supplies (for patients)					
OSHA standards					
Safety Data Sheets (SDS) -- location, usage					

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Patient Education-Meaningful use					
Phone triage, TE's					
PHQ-9 Depression Screen administration & documentation					
Prescription Order completion					
Prior Authorizations					
Recovery Team (Vivitrol, UDS, consents)					
Schedule visits (visit type, reason)					
Smoking Questionnaire & education					
Stock Rooms and Clinical Areas					
Teter (order form requirements, demographics, fax)					
Translator Services (phone in exam room)					
Understanding Fridge meds/incoming orders					
<b>Injections</b>					
Abilify (Aristada, Maintena) <sup>4</sup>					
Adult IM injection					
Adult immunizations					
Adult SC injection					
Bydureon <sup>4</sup>					
Depo Provera injection					
Sumatriptan (Imitrex) <sup>4</sup>					
Invega (Sustenna, Trinza) <sup>4</sup>					
Pediatric IM injection					
Pediatric immunizations					
Pediatric SC injection					
Prolia <sup>4</sup>					
Risperdal Consta <sup>4</sup>					
Rocephin (ceftriaxone) preparation and injection <sup>4</sup>					
Testosterone					
Toradol					
Vivitrol <sup>4</sup>					
<b>COVID testing/isolation</b>					
Donning/doffing PPE					
Ordering/printing tests and demographics -- add ICD codes					
IntakeQ forms (ipad, printing)					
Recording on test log (Annex and outreach)					
Performing the test (nasopharyngeal, anterior nares, oral)					
Charting (tester, documentation, dispo, locking visit)					
Checking portal results, downloading to chart					
Reconciling/charting/routing lab results					

**References:**

1) Kronenberger, Judy (2017). Lippincott Williams and Wilkins' Clinical Medical Assisting (5th ed.); Wolters Kluwer

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2) Bonewit-West, Kathy (2012). <u>Clinical Procedures for Medical Assistants</u> (8th ed.); Elsevier Saunders					
3) Lindh, Wilburta; Pooler, Marilyn; Tamparo, Carol; Dahl, Barbara; Morris, Julie; Rein, Angela (2014). <u>Comprehensive Medical Assisting</u> ; Delmar, Cengage Learning					
4) Up To Date (2020); <a href="https://www.uptodate.com/contents/search">https://www.uptodate.com/contents/search</a>					
5) Procedure Set-up binder in IDA or Team Drive -- T:\Policy & Procedures\Clinical Support Process & Protocols\MEDICAL-SURGICAL PROCEDURE SET-UP					
6) Munson Healthcare Laboratories <a href="https://mhc.testcatalog.org">https://mhc.testcatalog.org</a>					

last revised 9.8.20