NAME:	 	 
PRECEPTOR(S):		

Key: Method Key: Results

A. Actual Performance R. Read M. Meets expectations
D. Demonstration E. Educational Module N. Needs Improvement
O. Oral Review V. Viewed video NA. Not Applicable

D. Demonstration	E. Educational Module		N. Needs Improvement		
O. Oral Review	V. Viewed video		NA. Not Applicable		
Task	Date	Method	Results	Comment	Preceptor
	Completed			T	Initials
Vital Signs/Rooming					
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					
Documentation					
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)					
Procedures					
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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A. Actual Performance R. Read M. Meets expectations
D. Demonstration E. Educational Module N. Needs Improvement
O. Oral Review V. Viewed video NA. Not Applicable

O. Oral Review	V. Viewed video		NA. Not Applicable		
Task	Date	Method		Comment	Preceptor
· · · · ·	Completed				Initials
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					
Point of Care Lab Testing					
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					
Other					
** 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					

NAME:	
PRECEPTOR(S):	
PRECEPTOR(3).	

Key: Method Key: Results

A. Actual Performance R. Read M. Meets expectations
D. Demonstration E. Educational Module N. Needs Improvement
O. Oral Review V. Viewed video NA. Not Applicable

Patient Education-Meaningful use Phone triage, TE'S PHQ-9 Depression Screen administration & documentation Prescription Order completion Prescription Order completion Prescription Order completion Prescription Order completion Recovery Team (Vivitrol, UDS, consents) Schedule visits (visit type, reason) Schedule visits (visit type, reason) Schedule visits (visit type, reason) Stock Rooms and Clinical Areas Teter (order form requirements, demographics, fax) Teter (order form requirements, demographics orders) Teter (order form set orders) Teter (order form set orders) Teter (orders) Teter	O. Oral Review	V. Viewed video	NA. Not Applicable			
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Recording on test log (Annex and outreach)  Performing the test (nasopharyingeal, anterior nares, oral)  Charting (tester, documentation, dispo, locking visit)  Checking portal results, downloading to chart						
Performing the test (nasopharyingeal, anterior nares, oral)  Charting (tester, documentation, dispo, locking visit)  Checking portal results, downloading to chart						
Charting (tester, documentation, dispo, locking visit)  Checking portal results, downloading to chart						
Checking portal results, downloading to chart						
	Reconciling/charting/routing lab results					

References:	

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

NAME:			
PRECEPTOR(S):			
Key: Method		Key: Results	
A. Actual Performance	R. Read	M. Meets expectations	
D. Demonstration	F. Educational Module	N Needs Improvement	

O. Oral Review	V. Viewed video NA. Not Applicable				
Task	Date	Method	Results	Comment	Preceptor
	Completed				Initials

- 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). Comprehensive Medical Assisting;
  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 https://mhc.testcatalog.org

last revised 9.8.20