

Employee Name: _____

Date: _____

Position: Medical Assistant

Practice: _____

Supervisor: _____

Please rate your skill sets on what you have learned, still learning and need to learn. The rating system is rated 1 to 8 – 1 being the LOWEST and 8 being the HIGHEST. Employee can make comments in Employee column.

90 Day Competency Evaluation Clinical Position Requirements

TASK	Employee Name	Rate 1 to 8	N/A
Global Competencies			
Personal Accountability			
Customer Service			
Teamwork			
Communication			
Critical Thinking			
Position-Specific Competencies			
General Preparation			
Maintains good Patient Flow			
Setting up room for patient exams			
Patient preparation for exam			
Review new patient H & P			
Documentation of pt visit on Pt Visit Form			
Assist MD during the exam			
Document medical instructions given to pt			
Give pt appropriate written instructions and review with pt			
Informed Consent for cosmetic procedures			
Informed Consent for surgical procedures			
Informed Consent for Blu-U			
EHR			
Enter health history			
Enter information from pt visit as directed			
Enter and print RXs			
Explain RXs to pt			
Schedule pt visits			
Scan documents into appropriate sections			
TRAY SET UP			
Biopsy - Shave			
Biopsy - Punch			
Liquid Nitrogen			
Suture Removal			
Botox & Fillers			

TASK	Employee Name	Rate 1 to 8	N/A
PROCEDURE ASSISTING			
Biopsy - Shave			
Biopsy - Punch			
Liquid Nitrogen			
Suture Removal – ability to do w/o assistance			
Botox & Fillers			
Blu U – prepare pt for txment & implement txment			
TECHNIQUE			
Sterile			
Clean			
UNIVERSAL PRECAUTIONS			
Passed OSHA Training			
Knows location and use of Personal Protective Equipment			
MSDS – knows location of book			
HIPAA Trained			
EQUIPMENT: Maintenance and Use			
Autoclave			
Hyfercators			
Digital Camera			
Up load patient photos into EHR			
Printer			
Fax Machine			
Copier			
Telephone			
Alarm System			
Fire Alarm			
Knowledge of MS Word, MS Outlook, Excel			
Washer/Dryer			
Blue-U			
BIOHAZARDOUS WASTE			
Sharps Containers			
EMERGENCY EQUIPMENT			
AED Unit			
Spill Kit			
Emergency Shower			
Eyewash locations			
PATIENT RELATIONS			
Patient Complaints			
Telephone Courtesy			

TASK	Employee Name	Rate 1 to 8	N/A
SPECIMEN HANDLING			
Logging of Specimens in path book			
Use of appropriate Containers			
Lab requisition preparation			
Appropriate Lab			
Cultures			
Fungus Culture			
Tissue Specimens			
Retrieve Path & Lab results			
Document diagnosis in path book			
Notify pts of lab and culture results			
Notify pts of benign path results			
Notify pts of SCC, BCC results			
Explain results and treatment as directed			
After Hours Pick up: How to handle			
STERILIZATION			
Instrument Packaging			
Autoclave Cycles			
Expiration and Dating			
Attest			
Cleaning			
PATIENT EXAMS & PROCEDURES			
Patient positioning for exam and procedure			
Skin Prep			
Post-treatment procedures:			
Dressing			
Verbal and written wound care instructions			
Emergency Procedures & Monitoring:			
Temperature			
Blood Pressure			
Emergency Equipment			
MEDICATIONS:			
Pre-filling Syringes			
Medication Storage			
Ability to numb			
Maintenance of samples in rooms			
Maintain Sample closet			
Discard outdated samples			
Monitor samples to assure adequate supply and proper dispensing			
PRODUCTS LINE:			
Inventory tracking			
Notify appropriate person when products need to be ordered.			

TASK	Employee Name	Rate 1 to 8	N/A
SIDE WORK:			
Laundry			
Stocking Rooms and drawers			
Upkeep & cleanliness of rooms including but not limited to: Cabinets, countertops lights, exam table and drawers			
Maintenance supply rooms and sample closet			
Helps with office housekeeping duties as directed			
EMERGENCY PROCEDURES:			
CPR			
Hospital Transfer			
PRESCRIPTIONS			
Phone RXs and refills to pharmacies			
Obtain pre-authorizations as required			
Give to pt RX rebate cards and explain how to use			
Knowledge & Use of e-scribe			
MISCELLANEOUS			
Able to prioritize tasks, understand MD instructions			
Check & respond to emails MS outlook & EHR			
Knowledgeable of all procedures			
Knowledgeable of all products			
Ability to explain procedures to patients			
Ability to explain products to patients			
Check nurse voicemail, follow/up as appropriate			
Respond to patient questions in office and on phone			
Order, sort, restock of all products and supplies			
Ability to speak English clearly and make oneself understood.			
Verbal and written communication skills			
Computer Skills			
Ability to learn new software			
STAFF RELATIONS			
Works well with management			
Follows direction well			
Knows when to ask questions if does not know something.			
Exercises good teamwork			
Adheres to terms of confidentiality agreement			
Does not engage in gossip			
Takes Initiative			
Volunteers to do projects			
Knowledge of PM scheduling System			
Problem Solving skills			

TASK	Employee Name	Rate 1 to 8	N/A

Outline Goals for next 3 months:

I have reviewed all of the above items and understand that I will be held responsible to correctly assist with and/or perform required tasks.

Employee Signature: _____ **Date:** _____

I have reviewed the checklist with the above employee

Reviewer Signature: _____ **Date:** _____