

Medical Assistant Externship Knowledge & Skills

Learner name: _____

When the learner has completed each item, initial and rate the learner's demonstration of knowledge and skill. Feel free to add your observations in the comments section.

Rating Scale:

- 1 - Not evident
- 2 - Approaching standard
- 3 - Meeting standard
- 4 - Above standard
- 5 - Distinguished
- N/A - Not applicable

Standard 1: Personal/Interpersonal Knowledge and Skills		Rate 1-5 or N/A	Preceptor Initials
1.1	Demonstrates ethical conduct in all job-related activities.		
1.2	Presents an image appropriate for the profession in appearance and behavior.		
1.3	Demonstrates active and engaged listening skills.		
1.4	Communicates clearly when speaking and in writing.		
1.5	Demonstrates a respectful attitude when interacting with diverse patient populations.		
1.6	Applies self-management skills, including time management, stress management, and adapting to change.		
1.7	Applies interpersonal skills, including negotiation skills, conflict resolution, and teamwork.		
1.8	Applies critical thinking skills, creativity, and innovation to solve problems.		
Comments:			

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Standard 2: Healthcare Systems/Settings and Medical Law/Ethics		Rate 1-5 or N/A	Preceptor Initials
2.1	Demonstrates a knowledge of medical terminology.		
2.2	Properly applies office machines and operational functions.		
2.3	Maintains an inventory of supplies.		
2.4	Performs ICD-9 and/or CPT coding.		
2.5	Maintains confidentiality and demonstrates an understanding of HIPAA.		
2.6	Applies pharmacology principles.		
Comments:			

Standard 3: General Patient Care & Coordination, Communication, and Customer Service		Rate 1-5 or N/A	Preceptor Initials
3.1	Recognizes and responds to verbal communication.		
3.2	Recognizes and responds to non-verbal communication.		
3.3	Schedules inpatient and/or outpatient procedures.		
3.4	Obtains vital signs.		
3.5	Obtains and records patient history and manages medical charts.		
3.6	Organizes patients' medical records.		
3.7	Prepares and maintains examination and treatment area(s).		
3.8	Prepares patients and assists with physical exams or minor office or surgical procedures.		
3.9	Applies managed care policies and procedures.		

Comments:

Standard 4: Infection Control		Rate 1-5 or N/A	Preceptor Initials
4.1	Performs hand washing.		
4.2	Disposes of biohazardous waste.		
4.3	Performs sterilization procedures and autoclaving.		
4.4	Practices standard precautions.		
4.5	Performs asepsis technique.		
Comments:			

Standard 5: Microbiology, Testing, and Laboratory Procedures		Rate 1-5 or N/A	Preceptor Initials
5.1	Instructs patients in the collection of clean-catch, mid-stream urine specimen or fecal specimen.		
5.2	Performs diagnostic testing.		
5.3	Performs microbiological testing.		
5.4	Performs CLIA waived test(s).		
Comments:			

Standard 6: Phlebotomy		Rate 1-5 or N/A	Preceptor Initials
6.1	6.1 Performs venipuncture.		

6.2	6.2 Performs capillary puncture.		
Comments:			

Standard 7: EKG and Cardiovascular Testing		Rate 1-5 or N/A	Preceptor Initials
7.1	Performs electrocardiography.		
7.2	Performs respiratory testing.		
Comments:			

Standard 8: Administrative Assisting		Rate 1-5 or N/A	Preceptor Initials
8.1	Demonstrates telephone technique.		
8.2	Schedule appointments.		
8.3	Maintains appropriate documentation.		
8.4	Files medical records.		
8.5	Prepares bank deposits and follows billing and bookkeeping procedures.		
8.6	Processes insurance claims.		
8.7	Posts entries on day sheet.		
Comments:			



Site Supervisor or Preceptor's Signature: _____ Date: _____

Site Supervisor or Preceptor's Title: _____

The completed form can be submitted via email to externships@careerstep.com or fax to (801) 407-1951.