

# **Educational Competencies for Medical Assistants**

**For CAAHEP Accredited Medical Assisting  
Educational Programs**

**Based on 2015 Standards**

**MEDICAL ASSISTING  
EDUCATION REVIEW BOARD**

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## Introduction

The *Educational Competencies for the Medical Assistant* (ECMA) can be used in a variety of ways by the educators who teach within CAAHEP-accredited medical assisting programs. MAERB’s goal in producing the ECMA is to provide suggested evaluations for meeting each of the entry-level psychomotor and affective competencies in the 2015 MAERB Core Curriculum which can be found in Appendix B of the 2015 *Standards and Guidelines*.

For the majority of psychomotor and affective competencies, there are brief synopses of possible evaluations designed to have students perform and be assessed on those competencies. Instructors will need to develop the appropriate tool to demonstrate how students are being assessed and achievement is measured.

Many of the suggestions are based upon scenarios that either require discussion or role-playing or both. There is a great deal of possible variations that can occur within those suggested scenarios so creativity and ingenuity will certainly further develop those preliminary sketches

Several of the competencies have a number of evaluation options. It is definitely not required that all of them be used; rather they just indicate the range of options available to the educator.

There are a few competencies where there are no suggestions, simply because the competency itself provides the model for the assessment and achievement of the competency. You will see a notation that no suggestions are necessary.

Documentation of achievement of all competencies found in the psychomotor and affective domains must be evaluated in a manner consistent with the action verb.

As was outlined above, the MAERB produces this document to provide guidance. The ECMA has been a useful tool for the last several iterations of the MAERB Core Curriculum. In order to expand the dialogue, the MAERB is soliciting suggestions and samples from those who are teaching and working within CAAHEP-accredited medical assisting programs.

## CONTENT AREA I: Anatomy & Physiology

Psychomotor	
<p>1.P.1 Measure and record:</p> <ul style="list-style-type: none"> <li>a. blood pressure</li> <li>b. temperature</li> <li>c. pulse</li> <li>d. respirations</li> <li>e. height</li> <li>f. weight</li> <li>g. length (infant)</li> <li>h. head circumference (infant)</li> <li>i. pulse oximetry</li> </ul>	<p><i>NOTE: Documentation for recording may include:</i></p> <ul style="list-style-type: none"> <li>1. Patient chart</li> <li>2. Skill sheet</li> <li>3. Flow Sheet</li> </ul> <p>A. Measure and document blood pressure using the following equipment:</p> <ul style="list-style-type: none"> <li>1. anaerobic blood pressure cuff</li> <li>2. digital blood pressure cuff</li> </ul> <p>B. Measure and document temperatures using the following equipment:</p> <ul style="list-style-type: none"> <li>1. Disposable thermometer</li> <li>2. Digital thermometer</li> <li>3. Tympanic thermometer</li> <li>4. Temporal thermometer</li> </ul> <p>C. Measure and document radial and apical pulse</p> <p>D. Measure and document respirations</p> <p>E. Measure and document height using appropriate scale</p> <p>F. Measure and document weight using appropriate scale:</p> <ul style="list-style-type: none"> <li>1. Balance scale</li> <li>2. Electronic scale</li> </ul> <p>G. Measure and document length using appropriate equipment:</p>

	<ol style="list-style-type: none"> <li>1. Infant meter (length board) or</li> <li>2. Measuring tape</li> </ol> <p>H. Measure and document head circumference using appropriate equipment</p> <p>I. Measure and document patient's O<sup>2</sup> saturation rate using the appropriate equipment</p>
<p>I.P.2. Perform:</p> <ol style="list-style-type: none"> <li>a. Electrocardiography</li> <li>b. Venipuncture</li> <li>c. Capillary puncture</li> <li>d. Pulmonary function testing</li> </ol>	<p>No suggestions needed for electrocardiography.</p> <p>B. Venipuncture Collect and document venous blood specimen using appropriate techniques</p> <ol style="list-style-type: none"> <li>1. Multi-draw method (vacutainer)</li> <li>2. Winged-infusion method</li> <li>3. Syringe method</li> </ol> <p><i>Methods may be used in conjunction with obtaining specimens for testing.</i></p> <p>C. Capillary puncture Collect and document capillary blood specimen using appropriate techniques</p> <ol style="list-style-type: none"> <li>1. Finger stick</li> <li>2. Heel stick</li> </ol> <p><i>Method may be used in conjunction with obtaining specimens for testing.</i></p> <p>D. Pulmonary function testing Measure and document lung function using appropriate</p>

	<p>equipment:</p> <ol style="list-style-type: none"> <li>1. Spirometry</li> <li>2. Inhalation challenge tests</li> <li>3. Peak flow meter</li> </ol>
I.P.3 Perform patient screening using established protocols	<p>A. Using a provider approved step-by-step screening tool to question the patient and determine the next course of action (for example, appointment today, next available, report to hospital, call for emergency transport)</p> <p>B. Screen patient for visual acuity</p> <p>C. Screen patient for hearing acuity</p>
<p>I.P.4. Verify the rules of medication administration:</p> <ol style="list-style-type: none"> <li>a. Right patient</li> <li>b. Right medication</li> <li>c. Right dose</li> <li>d. Right route</li> <li>e. Right time</li> <li>f. Right documentation</li> </ol>	No suggestions needed.
I.P.5. Select proper sites for administering parenteral medications	<p>Using anatomical landmarks, locate sites on infants, children and adults for the following injections:</p> <ol style="list-style-type: none"> <li>1. intradermal</li> <li>2. subcutaneous</li> <li>3. intramuscular (deltoid, vastus lateralis, ventrogluteal, and dorsal gluteal)</li> </ol>
I.P.6. Administer oral medications	<p>Administer and document oral medication using the appropriate technique:</p> <ol style="list-style-type: none"> <li>1. Prepare and dispense solid and liquid medication</li> <li>2. Simulated sublingual medication</li> </ol>
I.P.7. Administer parenteral (excluding IV) medications	<p>Administer and document the following:</p> <ol style="list-style-type: none"> <li>1. intradermal injection</li> <li>2. subcutaneous injection</li> <li>3. intramuscular (deltoid, vastus lateralis, ventrogluteal, and dorsal gluteal) injections</li> <li>4. Z-track injection</li> </ol>

<p>I.P.8. Instruct and prepare a patient for a procedure or a treatment</p>	<p>A. Scenario: prepare a "patient" for a minor office procedure, such as removal of a lesion on the back. Explain to the patient the type of procedure, time needed for the procedure, and so on. Document that the patient has been instructed.</p> <p>B. Prepare an information sheet for a procedure manual that would be given to a patient prior to leaving the office when a procedure has been scheduled.</p>
<p>I.P.9. Assist provider with a patient exam</p>	<p>A. Properly position patient in the following manners:</p> <ul style="list-style-type: none"> <li>a. Supine</li> <li>b. Recumbent and dorsal recumbent</li> <li>c. Lithotomy</li> <li>d. Prone</li> <li>e. Sims</li> <li>f. Fowler's and Semi-Fowler's</li> <li>g. Trendelenberg</li> <li>h. Knee-chest</li> </ul> <p>B. Setting up the room appropriately for an exam (for example, gynecological and so on)</p>
<p>I.P.10. Perform a quality control measure</p>	<p>A. Calibrate and document appropriate equipment</p> <p>B. Measure and document the temperature of equipment</p> <p>C. Check expiration dates and storage instructions on all reagents and test kits</p> <p>D. Run appropriate quality control specimen on chemistry equipment, such as glucose or cholesterol testing equipment</p>

<p>I.P.11. Obtain specimens and perform the following:</p> <ul style="list-style-type: none"> <li>a. CLIA waived hematology test</li> <li>b. CLIA waived chemistry test</li> <li>c. CLIA waived urinalysis</li> <li>d. CLIA waived immunology test</li> <li>e. CLIA waived microbiology test</li> </ul>	<p>A. CLIA waived hematology test</p> <ul style="list-style-type: none"> <li>1. Perform and document the results of a spun microhematocrit</li> <li>2. Perform and document the results of an automated hemoglobin by a single analyze instrument</li> <li>3. Perform and document the results of an erythrocyte sedimentation rate (ESR)</li> </ul> <p>B. CLIA waived chemistry test</p> <ul style="list-style-type: none"> <li>1. Perform and document the results of a blood glucose</li> <li>2. Perform and document the results of cholesterol testing</li> <li>3. Perform and document the results of a human thyroid stimulating hormone (TSH)</li> </ul> <p>C. CLIA waived urinalysis</p> <ul style="list-style-type: none"> <li>1. Perform and document the results of a urinalysis <ul style="list-style-type: none"> <li>a. Manual</li> <li>b. Automated</li> </ul> </li> </ul> <p>D. CLIA waived immunology test</p> <ul style="list-style-type: none"> <li>1. Perform and document the results of beta HCG testing</li> <li>2. Perform and document the results of mononucleosis testing</li> <li>3. Perform and document the results of rapid strep testing</li> <li>4. Perform and document the results for <i>H. pylori</i> testing</li> <li>5. Perform and document the results for influenza A/B testing</li> </ul> <p>E. CLIA waived microbiology test</p> <ul style="list-style-type: none"> <li>1. Perform and document the results of strep testing</li> <li>2. Perform and document influenza A/B testing</li> <li>3. Perform and document HIV testing</li> </ul>
<p>I.P.12. Produce up-to-date documentation of current provider/professional level CPR</p>	<p>Participate in and complete healthcare provider/professional level CPR certification offered by an approved organization such as the American Red Cross or the American Heart Association.</p>

<p>I.P.13. Perform first aid procedures for:</p> <ul style="list-style-type: none"> <li>a. bleeding</li> <li>b. diabetic coma or insulin shock</li> <li>c. fractures</li> <li>d. seizures</li> <li>e. shock</li> <li>f. syncope</li> </ul>	<p>Perform and document first aid procedures for:</p> <ul style="list-style-type: none"> <li>a. bleeding.</li> <li>b. diabetic coma or insulin shock</li> <li>c. fractures</li> <li>d. seizures</li> <li>e. shock</li> <li>f. syncope</li> </ul>
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<b>Affective</b>	
<p>I.A.1. Incorporate critical thinking skills when performing patient assessment.</p>	<p>A. Scenario: Screen a patient calling with several symptoms to determine the next course of action (for example, appointment today, next available, report to hospital, call for emergency transport).</p> <p>B. Scenario: Medical Assistant uses critical thinking to determine the appropriate size and gauge of needle to use on a malnourished patient for an intramuscular injection.</p>
<p>I.A.2. Incorporate critical thinking skills when performing patient care.</p>	<p>Scenario: Without guidance, the medical assistant identifies a breach in clean/sterile environment of a patient undergoing a blood draw and notes the corrective action.</p>
<p>I.A.3. Show awareness of a patient's concerns related to the procedure being performed.</p>	<p>A. Scenario: Medical assistant reassures a patient undergoing a blood draw for the first time who expresses concern and apprehension.</p> <p>B. Scenario: Medical assistant reassures a patient undergoing her first gynecological exam who is nervous and anxious.</p>

## Content Area II: Applied Mathematics

Psychomotor	
<p>II.P.1. Calculate proper dosages of medication for administration.</p>	<p>A. Use drug references and medication labels to obtain information on the correct dosage of a medication to be administered.</p> <p>B. Calculate the correct dose ordered using the appropriate method:</p> <ol style="list-style-type: none"> <li>1. Body Surface Area calculation in metric or household units</li> <li>2. Measurement unit conversion</li> <li>3. Measurement system conversion</li> <li>4. West's Nomogram</li> <li>5. Kilogram of body weight</li> <li>6. Proportional method</li> <li>7. Formula method</li> <li>8. Young's, Fried's or Clark's formula</li> <li>9. Sliding scale</li> </ol> <p>C. Verify calculations.</p> <p>D. Select appropriate equipment, measure accurately, and dispense/withdraw correct dose.</p>
<p>II.P.2. Differentiate between normal and abnormal test results.</p>	<p>A. Use reference values from sample lab reports to identify normal and abnormal results for CLIA-Waived tests and compare with obtained and tested sample</p> <p>B. Use reference values found on urinalysis reagent strips to identify normal and abnormal test results</p> <p>C. Analyze results of vision and audiometry testing to identify normal and abnormal responses</p>
<p>II.P.3. Maintain lab test results using flow sheets.</p>	<p>A. Use a flow sheet to document the following types of laboratory test results:</p> <ol style="list-style-type: none"> <li>1. Prothrombin/INR</li> <li>2. Glucose</li> <li>3. Glycosylated hemoglobin (hemoglobin A1C)</li> <li>4. Lipid panel</li> <li>5. Liver function panel</li> </ol> <p>B. Place completed flow sheets in patient's medical record.</p>
<p>II.P.4. Document on a growth chart.</p>	<p>Measure and record infant length, weight, head and chest circumference on a growth chart.</p> <p>Measure and record height and weight of a child on a growth</p>

	chart.
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<b>Affective</b>	
<p>II.A.1. Reassure a patient of the accuracy of the test results.</p>	<p>A. Scenario: Patient questions the accuracy of the blood pressure readings obtained using their home monitor. The medical assistant requests that the patient bring the monitor to the office so the results can be compared with the equipment used by the clinic.</p> <p>B. Scenario: Patient calls or arrives at the office after having taken several pregnancy tests and is anxious regarding the accuracy of the results. The medical assistant reassures the patient that the tests available in OTC are the same used in the medical practice.</p> <p>C. Scenario: Patient questions the accuracy of the glucose readings obtained using their glucometer. The medical assistant requests that the patient bring their glucometer to the office so the results can be compared with the glucometer used by the clinic.</p>

## CONTENT AREA III: Infection Control

Psychomotor	
III.P.1. Participate in bloodborne pathogen training.	<p>A. Participate in bloodborne pathogen training offered by an approved organization such as the American Red Cross or the American Heart Association.</p> <p>B. Participate in scenario-based bloodborne pathogen training with documentation.</p>
III.P.2. Select appropriate barrier/personal protective equipment (PPE).	<p>A. Select appropriate barrier/personal protective equipment for an assigned activity</p> <p>B. Assess role-playing to demonstrate correct and incorrect use of PPE for different scenarios:</p> <ol style="list-style-type: none"> <li>1. Performing vital signs on a patient who has tested positive for tuberculosis and who has not yet initiated antimicrobial treatment.</li> <li>2. Changing a dressing on a patient with second degree burns</li> <li>3. Performing venipuncture to obtain blood for a CBC and fasting glucose</li> <li>4. Obtaining sample of wound exudate for microbiology</li> </ol>
III.P.3 Perform hand washing.	<p>A. Differentiate between direct and indirect contact, and apply to hand washing techniques</p> <p>B. Perform medical septic hand wash and hand sanitization</p> <p>C. Perform a surgical scrub</p> <p>D. Perform a surgical scrub</p> <p>E. Perform hand sanitization using antibacterial gels and foams</p>
III.P.4. Prepare items for autoclaving.	<p>A. Select a solution and sanitize instruments in preparation for wrapping and sterilization</p> <p>B. Select an appropriate wrapping material and indicator</p> <p>C. Sanitize and wrap an item or items to be used in autoclave</p>
III.P.5. Perform sterilization procedures.	Operate an autoclave, observing instructions for time, temperature and pressure appropriate for the item(s) being sterilized

III.P.6. Prepare a sterile field.	Prepare a sterile field for a minor office surgery (i.e. cyst removal)
III.P.7. Perform within a sterile field.	Assist with minor surgery.
III.P.8. Perform wound care.	Assess and irrigate a wound.
III.P.9. Perform dressing change.	Assess and perform a dressing change.
III.P.10. Demonstrate proper disposal of biohazardous material: a. sharps b. regulated wastes	A. Disposal of venipuncture equipment  B. Disposal of wound dressing change material

### Affective

III.A.1. Recognize the implications for failure to comply with Center for Disease Control (CDC) regulations in healthcare settings.	A. Scenario: Patient presents with a communicable disease, which is not reported by the designated staff member. The medical assistant alerts the physician or clinical supervisor or office manager regarding the failure and explains the implications to the provider.  B. Scenario: A medical assistant does not wear gloves during a dressing change and hands are contaminated with body fluids. What are the implications for the patient and the medical assistant's health and safety?
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## CONTENT AREA IV: Nutrition

### Psychomotor

IV.P.1. Instruct a patient according to a patient's special dietary needs.	A. Using a meal plan for a patient's special dietary needs instruct the patient on how to follow the plan.  B. Instruct a patient with a newly identified special dietary need in proper nutrition.  C. Scenario: Role play providing a patient instructions regarding a heart healthy diet.
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### Affective

IV.A.1. Show awareness of patient's concerns regarding a dietary change.	Scenario: New heart patient has been instructed to change diet, but is concerned that the change will be difficult to adopt, since the rest of his family has no dietary restrictions. Medical assistant uses appropriate body language and verbal acknowledgment to display empathy, provide supportive resources, and follow proper protocol.
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## CONTENT AREA V: Applied Communication

Psychomotor	
<p>V.P.1. Use feedback techniques to obtain patient information including:</p> <ul style="list-style-type: none"> <li>a. reflection</li> <li>b. restatement</li> <li>c. clarification</li> </ul>	<p>A. Scenario: Obtain a patient history, asking about past medical, social and family histories. Use the reflective technique to assist the patient in recalling this information.</p> <p>B. Scenario: Obtain a patient history asking about previous conditions. Use restatement technique to verify the information provided.</p> <p>C. Scenario: Obtain a patient history about allergies. When the patient responds in the affirmative, use a clarification technique to determine the patient's specific allergies.</p>
<p>V.P.2. Respond to nonverbal communication.</p>	<p>A. Scenario: Identify and respond to nonverbal communication such as personal space, posture, facial expressions or gestures.</p> <p>B. Scenario: Demonstrate interaction with a patient or co-worker using appropriate eye contact, touch, and facial expression.</p>
<p>V.P.3. Use medical terminology correctly and pronounced accurately to communicate information to providers and patients.</p>	<p>A. Scenario: Communicate with a "patient" about his/her diabetes or other chronic condition, using medical terms appropriately and pronouncing the words correctly. If necessary for understanding, translate the medical terms used for the patient.</p> <p>B. Scenario: Verbally transfer patient information to a healthcare provider using correct pronunciation of medical terms.</p>

<p>V.P.4. Coach patients regarding:</p> <ol style="list-style-type: none"> <li>office policies</li> <li>health maintenance</li> <li>disease prevention</li> <li>treatment plan</li> </ol>	<p>A. Prepare an Office Policy manual or brochure which includes policies regarding "office hours," "appointments," "patient's financial responsibilities," "medication refill policies," and so on.</p> <p>B. Provide patient education on the importance of health and wellness that is age appropriate for the patient.</p> <p>C. Provide appropriate office brochure(s) pertaining to a particular condition such as diabetes and the importance of diet, exercise, weight control, and so on, in relation to that disease.</p> <p>D. Scenario: Converse with an elderly patient who does not understand the importance of recommended immunizations.</p> <p>E. Scenario: Converse with a patient who does not want to follow physician instructions for a prescribed diet, physical therapy regimen or medication.</p>
<p>V.P.5. Coach patients appropriately, considering:</p> <ol style="list-style-type: none"> <li>cultural diversity</li> <li>developmental life stage</li> <li>communication barriers</li> </ol>	<p>A. Scenario: converse with a patient whose cultural beliefs limit understanding of a medical procedure.</p> <p>B. Scenario: explain a medical procedure to a child and/or elderly patient.</p> <p>C. Scenario: explain a procedure to a patient who has a vision, speech, or hearing impairment or who speaks a different language.</p>
<p>V.P.6. Demonstrate professional telephone techniques</p>	<p>A. Demonstrate the correct technique to use when answering the telephone in a medical office.</p> <p>B. Demonstrate professional telephone techniques, emphasizing how projecting a professional image as a medical assistant affects the public's impression of the medical facility.</p> <p>C. Use proper telephone etiquette when receiving calls and making outgoing calls in the medical office, including but not limited to courtesy, attitude, quality of voice, smiling, and so on</p>
<p>V.P.7. Document telephone messages accurately.</p>	<p>No suggestions needed.</p>
<p>V.P.8. Compose professional correspondence utilizing electronic technology.</p>	<p>A. Prepare a business letter to communicate medical information such as a letter of referral, patient test results, or an insurance prior authorization.</p>

V.P.9. Develop a current list of community resources related to patients' healthcare needs.	No suggestions needed.
V.P.10. Facilitate referrals to community resources in the role of a patient navigator.	A. Generate a referral for a patient, utilizing a list of community resources.  B. Scenario: Refer a patient who is unable to afford prescribed medications to an appropriate community resource.
V.P.11. Report relevant information concisely and accurately.	A. Scenario: Demonstrate how to inform the patient about laboratory test results.  B. Scenario: The patient reports inability to take the prescribed medication. Obtain the reason for the patient being unable to take the medication and a telephone message for the physician documenting the information.

Affective	
V.A.1. Demonstrate: <ul style="list-style-type: none"> <li>a. empathy</li> <li>a. active listening</li> <li>b. nonverbal communication</li> </ul>	A. Scenario: show empathy (facial expressions, verbal utterances, gestures and body language) when interacting with a patient who has just been diagnosed with a chronic debilitating disease.  B. Scenario: Interview a patient and prepare a medical history using active listening skills.  C. Scenario: use appropriate body language and other nonverbal skills, when obtaining/updating a patient's medical history or reason for the current visit.
V.A.2. Demonstrate the principles of self-boundaries.	A. Scenario: Respond to a patient's request when he/she requests your personal number, in case of questions after hours.  Prepare examples of appropriate and inappropriate personal postings on social media, and demonstrate them to the class.
V.A.3. Demonstrate respect for individual diversity including: <ul style="list-style-type: none"> <li>a. gender</li> <li>b. race</li> <li>c. religion</li> <li>d. age</li> <li>e. economic status</li> <li>f. appearance</li> </ul>	A. Role-play scenarios in which each of these biases interfere with patient care. Describe why it is important to the staff and patient for these to be addressed prior to providing care, in order to ensure quality care.

V.A.4. Explain to a patient the rationale for performance of a procedure.	<p>A. Role-play: Respond appropriately to a child who verbalizes fear that a throat culture will be painful.</p> <p>B. Role-play: Respond appropriately to a patient who questions why you are using PPE when changing a wound dressing.</p>
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## CONTENT AREA VI: Administrative Functions

<b>Psychomotor</b>	
VI.P.1. Manage appointment schedule, using established priorities	<p>A. Schedule patients' appointments using a manual or electronic system while following established guidelines for the following:</p> <ol style="list-style-type: none"> <li>1. New patient</li> <li>2. Established patient</li> </ol> <p>B. Adhering to the office appointment policy, perform and document appropriately the following scheduling processes:</p> <ol style="list-style-type: none"> <li>1. A patient cancellation</li> <li>2. A no-show appointment</li> <li>3. A rescheduled appointment</li> </ol>
VI.P.2. Schedule a patient procedure	<p>A. Scenario: Schedule a patient for a diagnostic testing procedure that requires patient preparation. (Colonoscopy, radiology procedures, and so on)</p> <p>B. Scenario: Schedule a simulated inpatient or outpatient procedure (surgical procedure, medical admission).</p>
VI.P.3. Create a patient's medical record	A. Create a manual or electronic medical record according to the needs and guidelines of the medical practice
VI.P.4. Organize a patient's medical record	<p>A. Sort and place reports, forms or letters in a patient's manual medical record</p> <p>B. Scan and place reports, forms or letters in a patient's electronic medical record</p>
VI.P.5. File patient medical records	<p>A. Arrange a group of names in alphabetical order, applying indexing rules</p> <p>B. Arrange a group of charts in alphabetical or numerical order</p>

VI.P.6. Utilize an EMR	<p>A. Using an EMR, do the following:</p> <ol style="list-style-type: none"> <li>1. Enter patient information, such as medical history, social and family history, drug allergies, vital signs, and so on.</li> <li>2. Enter a physician-ordered diagnostic test or prescription</li> </ol>
VI.P.7. Input patient data utilizing a practice management system	<p>A. Using a practice management system or an EMR, do the following:</p> <ol style="list-style-type: none"> <li>1. Enter new patient demographic information</li> <li>2. Update established patient demographic information</li> </ol>
VI.P.8. Perform routine maintenance of administrative or clinical equipment	<p>A. Utilize a maintenance check list for administrative or clinical equipment that includes the following:</p> <ol style="list-style-type: none"> <li>1. Date of inspection</li> <li>2. Equipment inspected</li> <li>3. Location of equipment</li> <li>4. When next inspection is due (daily, weekly, monthly, annually)</li> <li>5. Condition of equipment</li> <li>6. Any repairs needed</li> <li>7. Routine maintenance performed (such as changing toner, changing microscope bulb, and so on)</li> </ol>
VI.P.9. Perform an inventory with documentation	<p>A. Utilize an inventory check list of administrative and/or clinical supplies or equipment that includes the following:</p> <ol style="list-style-type: none"> <li>1. Date of inventory</li> <li>2. Supplies or equipment inventoried</li> <li>3. Location of supplies or equipment</li> <li>4. Indicate if reorder is needed</li> </ol>

<b>Affective</b>	
VI.A.1. Display sensitivity when managing appointments	Scenario: Display sensitivity when making an appointment for a patient with an abnormal mammogram.

## CONTENT AREA VII: Basic Practice Finances

<b>Psychomotor</b>	ECMA
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VII.P.1. Perform accounts receivable procedures to patient accounts, including posting: a. charges b. payments c. adjustments	Using simulated services (manual or computer), post the following to a patient's account: a. charges b. payments (personal or third party) c. adjustments (personal or third party)
VII.P.2. Prepare a bank deposit	No suggestions needed.
VII.P.3. Obtain accurate patient billing information	Scenario: obtain accurate patient billing information (such as a photo ID, insurance card, and so on)
VII.P.4. Inform patients of their financial obligations for services rendered	A. Scenario: Using a practice's financial policies, determine the amount owed by a patient for services rendered, and inform the patient of the financial obligation.  Develop a patient brochure that details the patient's financial obligations in accordance with the practice's financial policies.

<b>Affective</b>	
VII.A.1. Demonstrate professionalism when discussing a patient's billing record	Scenario: Demonstrate professionalism when requesting that a patient pay the charges for services rendered, (such as copayments, coinsurance amounts, deductibles or a past due bill)
VII.A.2. Display sensitivity when requesting payment for services rendered	Scenario: Demonstrate sensitivity in the following situations:  a. asking a patient for the copay due for a service rendered b. a patient indicates they have no available funds

## CONTENT AREA VIII: Third Party Reimbursement

<b>Psychomotor</b>	
VIII.P.1. Interpret information on an insurance card	Scenario: Determine carrier policy requirements based on patient's insurance card.

VIII.P.2. Verify eligibility for services including documentation	Scenario: Contact the insurance company and verify eligibility for services
VIII.P.3. Obtain precertification or preauthorization, including documentation	Scenario focused on the following: <ol style="list-style-type: none"> <li>1. determine need for precertification or preauthorization</li> <li>2. identify information needed to obtain precertification or preauthorization</li> <li>3. simulate obtaining the required permission</li> <li>4. document appropriately in the patient's chart.</li> </ol>
VIII.P.4. Complete an insurance claim form	No suggestions needed.
<b>Affective</b>	
VIII.A.1. Interact professionally with third party representatives	Scenario: Demonstrate assertive but professional, communication with third-party representatives
VIII.A.2. Display tactful behavior when communicating with medical providers regarding third-party requirements	Scenario: Communicate tactfully with medical providers regarding third-party requirements: <ol style="list-style-type: none"> <li>1. additional documentation needed to support medical necessity</li> <li>2. preauthorization for prescribed medications</li> <li>3. second opinion before elective surgery</li> </ol>
VIII.A.3. Show sensitivity when communicating with patients regarding third-party requirements	Scenario: Show sensitivity when explaining to the patient (in terms that they can understand) regarding third-party requirements: <ol style="list-style-type: none"> <li>1. preauthorization or precertification requirements</li> <li>2. copayments, coinsurance, deductibles</li> <li>3. second surgical opinions</li> </ol>

## CONTENT AREA IX: Procedure & Diagnostic Coding

Psychomotor	
IX.P.1. Perform procedural coding	<p>A. Locate and document codes from the current CPT manual.</p> <p>B. Analyze a simulated patient chart and code the procedures from the current CPT manual.</p>
IX.P.2. Perform diagnostic coding	<p>A. Locate and document codes from the most current diagnostic coding system.</p> <p>B. Extract diagnoses from sample medical records and code to the highest level of specificity.</p>
IX.P.3. Utilize medical necessity guidelines	<p>A. Using medical necessity guidelines (national or local), review a case study to determine if the documentation supports a physician ordered diagnostic test.</p> <p>B. Scenario: Link diagnostic codes to the proper procedure codes based on medical necessity guidelines</p>

Affective	
IX.A.1. Utilize tactful communication skills with medical providers to ensure accurate code selection	Simulate a meeting in which a medical assistant discusses with a medical provider the importance of and the methods needed to achieve correct coding for reimbursement.

## CONTENT AREA X: Legal Implications

Psychomotor	
X.P.1. Locate a state's legal scope of practice for medical assistants.	Have students research the scope of practice for medical assistants in the state in which they reside and submit a summary of the scope of practice and where it is located.
X.P.2. Apply HIPAA rules in regard to: <ul style="list-style-type: none"> <li>a. privacy</li> <li>b. release of information</li> </ul>	<p>A. Scenario: A family member of a patient calls and requests information regarding the patient. Demonstrate how this situation should be handled.</p> <p>B. Complete an authorization to release medical records.</p>

<p>X.P.3. Document patient care accurately in the medical record.</p>	<p>A. Record/document vital signs and chief complaint on paper or electronic progress notes.</p> <p>B. Scenario: Document in a patient's medical record, the removal of sutures, including the number of sutures removed.</p> <p>C. Document the preparation of a patient for a surgical procedure, x-ray or other treatment in an outpatient facility.</p> <p>D. Scenario: Document the results of laboratory tests and treatments using correct medical terminology.</p>
<p>X.P.4. Apply the Patient's Bill of Rights as it relates to:</p> <ul style="list-style-type: none"> <li>a. choice of treatment</li> <li>b. consent for treatment</li> <li>c. refusal of treatment</li> </ul>	<p>A. Scenario: Respond to a patient who is presented with two choices for treatment and chooses the one not recommended by the provider.</p> <p>B. Scenario: Respond to a patient who is refusing to consent to receive medical care due to a cultural belief.</p> <p>C. Scenario: Communicate with a parent of a minor who does not want the minor immunized.</p>
<p>X.P.5. Perform compliance reporting based on public health statutes.</p>	<p>Scenario: Follow proper procedure when a reportable disease is confirmed in a patient by identifying and notifying the proper agency.</p>
<p>X.P.6. Report an illegal activity in the healthcare setting following proper protocol.</p>	<p>A. Scenario: Follow proper reporting protocol when an OSHA violation has occurred.</p> <p>B. Scenario: You have witnessed a co-worker removing drug samples from the storage cabinet for personal use. Role-play the steps and chain of command for reporting the incident.</p>

X.P.7. Complete an incident report related to an error in patient care.	No suggestions needed.
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<b>Affective</b>	
X.A.1. Demonstrate sensitivity to patient rights.	Using the Patient's Bill of Rights, describe how a medical assistant should inform the provider regarding a patient's refusal of treatment.
X.A.2. Protect the integrity of the medical record.	<p>Scenario: Explain tactfully to a co-worker how to maintain confidentiality of the medical record.</p> <ol style="list-style-type: none"> <li>1. Patient chart is left in an exam room.</li> <li>2. Computer monitor privacy screen has been removed and identifiable patient information is visible.</li> <li>3. The co-worker has shared his/her electronic record password with another employee</li> </ol>

## CONTENT AREA XI: Ethical Consideration

<b>Psychomotor</b>	
XI.P.1. Develop a plan for separation of personal and professional ethics.	<p>A. Scenario: A medical assistant who is ethically opposed to abortion is asked to refer a patient to a clinic that performs elective abortions. Develop a plan detailing how the medical assistant would fulfill professional duties without allowing personal ethics to influence the care of the patient.</p> <p>B. Describe an incident in which the medical assistant would set aside personal beliefs in order to provide compassionate and professional care to a patient who practices a different religion than his/her own.</p>

<p>XI.P.2. Demonstrate appropriate response(s) to ethical issues.</p>	<p>A. Scenario: A patient pays his bill in cash. At the end of the day, the medical assistant discovers that he/she failed to give the correct change to that patient, resulting in a significant cash overage. Identify the ethical issue and demonstrate the appropriate response.</p> <p>B. Scenario: During a particularly busy day while setting up a sterile field, the medical assistant inadvertently contaminates the field, but continues setting up for the procedure and does not inform the provider of the breach. Identify the ethical issue and demonstrate the appropriate response.</p> <p>C. Scenario: A patient offers a gratuity to the medical assistant who helped him/her obtain samples of medication. Identify the ethical issue and demonstrate the appropriate response.</p>
<p><b>Affective</b></p>	
<p>XI.A.1. Recognize the impact personal ethics and morals have on the delivery of healthcare.</p>	<p>A. Scenario: Due to an error, a deficient dose of antibiotic was administered to a patient. Discuss potential implications to the patient's health for not reporting this error.</p> <p>B. Scenario: Describe a situation in which personal morals might interfere with the ability to perform duties as a medical assistant. Respond to this dilemma in a professional manner without compromising patient care or personal integrity.</p>

## CONTENT AREA XII: Protective Practices

Psychomotor	
<p>XII.P.1. Comply with:</p> <ul style="list-style-type: none"> <li>a. Safety signs</li> <li>b. Symbols</li> <li>c. labels</li> </ul>	<p>A. Properly store and dispose of supplies and specimens according to Standard Precautions and OSHA guidelines.</p> <p>B. Perform a review of the facility to ensure that the following have the appropriate labels and correct as necessary:</p> <ol style="list-style-type: none"> <li>1. Refrigerator used to store reagents, test kits, or biological specimens are labeled with a biohazard symbol and bear the legend “not for storage of food or medications.”</li> <li>2. Biohazard waste receptacles bear the biohazard symbol and are lined with red plastic bags. Biohazard waste is not disposed of in inappropriate receptacles</li> <li>3. Chemicals and reagents are evaluated for hazard category classification and labeled with the National Fire Association’s color and number coding.</li> <li>4. Signs are clearly posted in appropriate places for prohibiting smoking, eating, drinking, or application of cosmetics or contact lenses in the facility.</li> </ol>
<p>XII.P.2. Demonstrate proper use of:</p> <ul style="list-style-type: none"> <li>a. Eyewash equipment</li> <li>b. fire extinguishers</li> <li>c. sharps disposal containers</li> </ul>	<p>A. Demonstrate use of the eyewash station and explain how the nature of the contaminant influences the length of time for flushing the eyes after exposure.</p> <p>B. Evaluate the fire extinguisher’s rating and demonstrate the proper method of use according to the manufacturer’s instructions.</p> <p>C. Demonstrate the proper use of sharps disposal containers and describe the fill height and proper disposal of the containers.</p>

<p>XII.P.3. Use proper body mechanics.</p>	<p>A. Demonstrate correct body mechanics to safely assist the physician and the patient during an examination.</p> <p>B. Demonstrate correct body mechanics while assisting the patient on and off a scale.</p> <p>C. Demonstrate correct body mechanics while assisting a patient during wheelchair transfer.</p> <p>D. Demonstrate correct body mechanics while lifting or moving a heavy box.</p>
<p>XII.P.4. Participate in a mock exposure event with documentation of steps taken.</p>	<p>A. Use a scenario to identify exposure control mechanisms in a simulated exposure event and document the steps taken to handle the exposure event.</p> <p>B. Plan and participate in a mock environmental exposure event in the home. Prepare the family members in the necessary steps needed for personal and family safety.</p> <p>C. Plan and participate in a mock environmental exposure event in the medical office. Prepare the staff in the necessary steps needed for personal and patient safety</p>
<p>XII.P.5. Evaluate the work environment to identify unsafe working conditions.</p>	<p>A. Utilizing a checklist, perform a safety inspection of your facility at intervals according to institution policy and report to your instructor.</p> <p>B. Using scenarios, perform safety inspections of a facility at intervals according to institutional policy and report findings to the instructor.</p> <p>C. Verify that needle stick prevention devices (safety needles) are used and proper disposal is performed.</p>

<b>Affective</b>	
<p>XII.A.1. Recognize the physical and emotional effects on persons involved in an emergency situation.</p>	<p>Scenario: Identify the manifestations of stress such as sleep deprivation, decreased social skills, change in appetite and a feeling of powerlessness and relate the manifestation to the stress event.</p>

XII.A.2. Demonstrate self-awareness in responding to an emergency situation.

A. Perform a self-evaluation of your knowledge and skills required in an emergency situation.

B. Create scenarios of how you would handle emergency situations.

## SAMPLE AFFECTIVE RUBRICS

### Introduction

The MAERB has received several comments from CAAHEP-accredited Program Directors that the affective competencies are very difficult to measure and to evaluate. In response to those comments, the MAERB has put together these materials to help CAAHEP-accredited Program Directors with developing affective rubrics. It is important to note that these materials are not definitive. These rubrics can work in conjunction with the sample assignments in the *Educational Competencies for Medical Assistants (ECMA)*, even though they will certainly need to be adapted and refined according to the individual needs of the programs. In fact, these sample rubrics are designed to help Program Directors generate their own ideas about designing rubrics for individual assignments. Just as with the ECMA, these rubrics are optional for Program Directors to use, and they are not formally part of the MAERB Core Curriculum.

### Overview—Rubric for Affective Behaviors

The following rubric contains a full range of different behavior attributes, and sections of it can be used effectively in different assignments. It is a rubric that is designed for Program Directors to cut and paste for specific competencies. In addition, there is a variety of additions that could be made depending upon the task.

Rubric: Affective Behaviors

	<b>Does not meet expectations</b>	<b>Needs Improvement</b>	<b>Meets Expectations</b>	<b>Sometimes exceeds expectations</b>	<b>Consistently exceeds expectations</b>
Integrity	Does not always demonstrate honesty and trustworthiness and/or provides incomplete documentation.	Honest and trustworthy with property and confidential information, but does not always completely and accurately document patient care and learning activities.	Consistent honesty, being able to be trusted with property and confidential information, complete and accurate documentation of patient care and learning activities.	Consistent honesty, assists other classmates in understanding confidential issues and in developing their documentation skills.	Always honest, leads by example and models exemplary behaviors regarding integrity. Consistently turns in paperwork that is complete and accurate.

Empathy	Being deliberately disrespectful of others, making fun of others, being condescending or sarcastic to others, clearly uncomfortable dealing with emotions of patients.	Being uncompassionate to others or responding inappropriately to emotional responses because you are uncomfortable with their emotional displays. Acting coolly towards patients in distress and not acting as a patient advocate	Showing compassion to others, responding appropriately to emotional responses by others, demonstrating respect to others, being supportive and reassuring.	Able to show compassion and respond appropriately while maintaining professional demeanor, demonstrating a strong desire to advocate for the patient, can direct patients and their families to available community resources.	Seeks out opportunities to serve in the community, when the situation arises can provide contact information on assistance agencies, has the ability to set troubled patients at ease and actively listens to their problems and concerns.
Self-motivation	Consistently failing to meet established deadlines, unable to demonstrate intrinsic motivating factors requiring extra extrinsic motivation from instructors, failing to improve even after corrective feedback has been provided by faculty, requiring constant supervision to complete tasks or being asked to repeat a task that is incorrectly performed.	Not actively taking the initiative to improve behavior, or follow through on tasks, or seeking improvement but obviously making attempts to attain acceptable standards.	Taking initiative to complete assignments, taking initiative to improve or correct behavior, taking on and following through on tasks without constant supervision, showing enthusiasm for learning and improvement, consistently striving for improvement in all aspects of patient care and professional activities, accepting constructive criticism in a positive manner, taking advantage of learning opportunities.	Occasionally completing and turning in assignments before the scheduled deadline, volunteering for additional duties, consistently striving for excellence in all aspects of patient care and professional activities, seeking out a mentor or faculty member to provide constructive criticism, informing faculty of learning opportunities.	Never missing a deadline and often completing assignments well ahead of deadlines, reminding other students of deadlines, supporting faculty in upholding the rules and regulations of the program, taking seriously opportunities to provide feedback to fellow students, seeking opportunities to obtain feedback, assisting in arranging and coordinating activities.

Appearance and Personal Hygiene	Inappropriate uniform or clothing worn to class or clinical settings. Poor hygiene or grooming.	Appropriate clothing or uniform is selected generally, but the uniform may be unkempt (wrinkled), mildly soiled, or in need of minor repairs, appropriate personal hygiene is common, but occasionally the individual is unkempt or disheveled.	Clothing and uniform is appropriate, neat, clean and well-maintained, good personal hygiene and grooming.	Clothing and uniform are above average. Uniform is pressed and business casual is chosen when uniform is not worn. Grooming and hygiene is good or above average.	Uniform is always above average. Non-uniform clothing is businesslike. Grooming and hygiene is impeccable. Hair is worn in an appropriate manner for the environment and student is free of excessive jewelry. Make-up and perfume or cologne usage is discreet and tasteful.
Self-confidence	Does not trust personal judgment, is unaware of strengths or weaknesses, and frequently exercises poor personal judgement.	Needs encouragement before trusting personal judgment, is aware of strengths but does not readily recognize weaknesses, sometimes makes poor personal choices.	Demonstrating the ability to trust personal judgment, demonstrating an awareness of strengths and limitations, exercises good personal judgement.	Stands by his/her choices when challenged by an authority figure, aware of strengths and weaknesses and seeks to improve, exercises good personal judgement and often serves as a mentor for classmates.	Stands by and can defend personal choices when challenged by an authority figure, actively seeks to improve on weaknesses, seeks out opportunities to assist other classmates in developing their self-confidence.

Communication s	Unable to speak or write clearly and is unable to correct their behavior despite intervention by instructors, does not actively listen (requires instructions to be repeated or appears unable to follow directions), resistant to learning new communications strategies.	Needs work to speak or write clearly, knows how to actively listen although sometimes is unable to model good listening skills, able to identify alternative communication strategies needed in various situations but is still developing the skill to perform alternative strategies.	Speaking clearly with good pace and volume, writing legibly, listening actively, adjusting communications strategies to various situations, uses appropriate vocabulary, complete sentences, and correct grammar, defines specialized terms for complete comprehension.	Working on improving speaking and writing abilities, models active listening skills, able to modify communication strategies easily in various situations and able to effectively communicate a message in these various settings.	Demonstrates exemplary communication skills by adapting the pace and volume to the recipient's needs, writing clearly and coherently, patterning strong active listening skills, and is comfortable utilizing a variety of communication styles, may have proficiency in another language, including sign language.
Active Listening	Does not demonstrate active listening skills either verbally or non-verbally by trying to "mind read" without listening, rehearsing what is to be said rather than listening, judging, and lecturing. Nonverbally, there is a defensiveness and guardedness in body movement and facial gestures.	Generally demonstrates active listening skills both verbally and non-verbally by mastering at least half of the characteristics listed below. Verbally by asking appropriate open-ended questions, repeating back/paraphrasing statements for clarification of facts and feelings, recognizing when to provide positive reinforcement, and responding to questions and	Demonstrates active listening skills both verbally and non-verbally by mastering most of the characteristics listed below. Verbally by asking appropriate open-ended questions, repeating back/paraphrasing statements for clarification of facts and feelings, recognizing when to provide positive reinforcement, and responding to questions and statements without judgment, bias, or condescension. Non-	Demonstrates strong active listening skills both verbally and non-verbally but the characteristics are not completely natural yet. Verbally by asking appropriate open-ended questions, repeating back/paraphrasing statements for clarification of facts and feelings, recognizing when to provide positive reinforcement, and responding to questions and statements without judgment, bias, or condescension. Non-	Demonstrates exemplary active listening skills both verbally and non-verbal. Verbally by asking appropriate open-ended questions, repeating back/paraphrasing statements for clarification of facts and feelings, recognizing when to provide positive reinforcement, and responding to questions and statements without judgment, bias, or condescension. Non-verbally by developing and maintaining eye contact, physically "leaning in" or

		statements without judgment, bias, or condescension. Non-verbally by developing and maintaining eye contact, physically “leaning in” or “opening up,” and effectively mirroring or reflecting facial expression.	verbally by developing and maintaining eye contact, physically “leaning in” or “opening up,” and effectively mirroring or reflecting facial expression.	verbally by developing and maintaining eye contact, physically “leaning in” or “opening up,” and effectively mirroring or reflecting facial expression.	“opening up,” and effectively mirroring or reflecting facial expression.
Nonverbal Communication	Does not maintain eye contact and use appropriate gestures and facial expressions that match the verbal statements, speaks artificially, and does not respond to non-verbal behaviors.	Generally demonstrates strong nonverbal communication skills by mastering at least half of the following: maintaining eye contact to establish rapport, using gestures, facial expressions, and posture to reinforce the verbal message, using an authentic tone and a natural pitch and volume, and recognizing and responding to the non-verbal behaviors within a specific situation.	Demonstrates strong nonverbal communication skills and has mastered most of the following: maintaining eye contact to establish rapport, using gestures, facial expressions, and posture to reinforce the verbal message, using an authentic tone and a natural pitch and volume, and recognizing and responding to the non-verbal behaviors within a specific situation.	Demonstrates strong nonverbal communication skills, but needs more practice, by maintaining eye contact to establish rapport, using gestures, facial expressions, and posture to reinforce the verbal message, using an authentic tone and a natural pitch and volume, and recognizing and responding to the non-verbal behaviors within a specific situation.	Demonstrates exemplary nonverbal communication skills by maintaining eye contact to establish rapport, using gestures, facial expressions, and posture to reinforce the verbal message, using an authentic tone and a natural pitch and volume, and recognizing and responding to the non-verbal behaviors within a specific situation.
Time management	Often late to class or clinical sites, upon arrival needs additional time to be ready to begin	Occasionally late in arriving to class or clinical sites, occasionally late in turning in	Consistent punctuality, completing tasks and assignments on time.	Seldom late to class or clinical, generally ready to begin class or clinical prior to the actual start time,	Punctual (or early) nearly 100% of the time, completes tasks and assignments prior to the due date, seldom

	(changing into uniform, gathering supplies, etc.), frequently late in turning in assignments, requires constant reminders about due dates and will blame others if a due date is missed.	assignments or requires reminding about deadlines.		completes tasks and assignments by due date (and occasionally in advance of due date) with minimal need for reminders of due dates.	requires reminding about deadlines or due dates, may assist instructor in reminding classmates about due dates.
Teamwork and Diplomacy	Manipulating the team or acting with disregard to the team, being disrespectful of team members, being resistant to change or refusing to cooperate in attempts to work out solutions.	Sometimes acting for personal interest at the expense of the team, acting independent of the team or appearing non-supportive, being somewhat resistant to change or occasionally unwilling to work out a solution.	Placing the success of the team above self-interest, not undermining the team, helping and supporting other team members, showing respect for all team members, remaining flexible and open to change, communicating with others to resolve problems.	Placing success of the team above self-interest, supporting and holding up the team by shouldering additional responsibilities, actively seeking to include all members of the team in decision making processes were appropriate, welcoming change and remaining flexible, helping to open the lines of communication.	Placing success of the team above self-interest (even if that means a negative outcome to self), taking a leadership role and using good management skills while leading, involving all appropriate team members in the decision making process, suggesting and implementing changes to benefit the team, seeking ways to keep communications and dialogue going.
Respect	Disrespectful of authority, being argumentative, using inappropriate words or outbursts of anger, deliberately	Being polite when required, occasionally overheard using demeaning or derogatory language	Being polite to others, not using derogatory or demeaning terms, behaving in a manner that brings credit to the profession.	Being polite even when a situation is not going in his/her favor, always using respectful language when describing situations	Serving as a "peacemaker" in volatile situations, able to take abusive language or disrespect from patients without

	undermining authority in words or actions or trying to provoke others, frequently unable to act in a professional manner.	but confining it to situations other than in patient care settings, occasionally acting unprofessional on the job.		even when not in public areas, modeling good professional behaviors.	reacting negatively towards the individual, modeling good professional behaviors even when outside of the classroom or off of the job.
Patient Advocacy	Unable to deal with patients because of personal biases, actively demeaning or degrading patients with words or deeds, unconcerned about patient rights, feelings or considerations, frequently takes shortcuts during care of patients because it is "easier" or faster."	Occasionally has difficulty dealing with patients because of personal bias or feelings, not always able to place the needs of the patient first.	Not allowing personal bias or feelings to interfere with patient care, placing the needs of patients above self-interest, protecting and respecting patient confidentiality and dignity.	Not allowing personal bias or feelings to interfere with patient care despite strong negative feelings or biases towards a patient or situation, actively advocating for patient rights, protecting confidentiality.	Models patient advocacy and able to defend the need to advocate for patient rights, seeks out opportunities to help fellow classmates learn the principles of patient advocacy, when the opportunity presents itself can be called upon to follow through on an advocacy issue even if it means it on their off time.
Careful delivery of services	Unable to perform skills at entry level or requiring constant monitoring or reinforcement to perform skills, required to recheck tasks because of omissions or inaccuracies in performance or documentation, unwilling to learn	Occasionally performing skills below the entry-level, requiring monitoring to ensure completeness and accuracy in completing tasks, occasional minor breeches in policies, procedures or protocols attributed to lack of knowledge of	Performing skills at an entry-level capacity a majority of the time, following policies and procedures and protocols, following orders.	Can be trusted to function independent of all rules, regulations, policies and procedures.	Functions independently and able to correct mistakes by self-reflection, able to assist in the development of rules, regulations, policies and procedures, will assist in monitoring fellow students in the completion of tasks and may be able to assist fellow students identify weaknesses and

	policies, procedures or protocols, deliberate unwillingness to follow the letter or spirit of rules or regulations.	it but willing to learn, may follow the letter of, but not always the spirit, of rules and regulations.			strengths.
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### Overview—Samples of Affective Competencies

The following examples of affective competencies include specific criteria used to evaluate the student performing the competency. These are just examples of selected affective competencies, but they contain several interesting variations and the criteria can be adapted for other affective competences.

I.A.3. Show awareness of a patient’s concerns related to the procedure being performed

<b>COMPETENCY:</b>	<b>I.A.3. Show awareness of a patient’s concerns related to the procedure being performed</b>
<b>OBJECTIVE(s):</b>	Given the conditions, and provided the necessary supplies, the students will demonstrate awareness of patient concerns as they provide patient care in a role-play scenario for a student-partner.
<b>SUPPLIES:</b>	Predetermined case study or patient scenario (patient presents to office for visit and voices concerns over planned procedure) provided by instructor, simulated patient chart (electronic or paper)
<b>TIMEFRAME:</b>	15 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for “PASS.” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a “✓” for “PASS.”. When step is omitted and/or there is an error in written procedure, record instructor initials for “FAIL,” procedure must be repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
1.	Gathered supplies and reviewed the new or established patient’s medical history form.				
2.	Correctly prepared the patient: <input type="checkbox"/> Greeted the patient, introduced self, escorted him/her to exam room, and verified name. <input type="checkbox"/> Made appropriate eye contact with the patient <input type="checkbox"/> Established a professional and empathetic atmosphere <input type="checkbox"/> Explained procedure to patient				
3.	Responds to patient concerns: <input type="checkbox"/> Shows empathy towards patient <input type="checkbox"/> Assures they understand concerns by repeating them and verifying them with patient <input type="checkbox"/> Explain procedure again to assure patient understanding <input type="checkbox"/> Answered any questions from patient <input type="checkbox"/> Assure patient that procedure is necessary <input type="checkbox"/> Provide necessary follow up contact information				
4.	Demonstrated professional behavior and exhibited appropriate conduct: <input type="checkbox"/> Prioritized tasks; remained organized throughout task <input type="checkbox"/> Communicated with patient appropriately and with ease throughout task <input type="checkbox"/> Properly disposed of medical waste according to OSHA guidelines <input type="checkbox"/> Groomed appearance and appropriate attire				

II.A.1 Reassure a patient of the accuracy of the test results

<b>COMPETENCY:</b>	<b>II.A.1 Reassure a patient of the accuracy of the test results</b>
<b>OBJECTIVE(s):</b>	Given the conditions, and provided the necessary supplies, the student will reassure a patient regarding the accuracy of test results.
<b>SUPPLIES:</b>	Scenario provided by instructor. For example: HbA1c test results = 8.2% and MD diagnoses patient with type II diabetes. Patient does not believe these results are accurate because he “feels fine.”
<b>TIMEFRAME:</b>	5 minutes
<b>GRADING:</b>	PASS = 100% accuracy; All steps must be completed as written for “PASS.” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written record a “✓” for “PASS.” When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL</b> ,” procedure must be repeated.
<b>WORK PRODUCT:</b>	Documentation in patient chart
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids. <b>Gloves and goggles are required for this procedure</b>

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
5.	<input type="checkbox"/> Review test results with patient <input type="checkbox"/> Explain to patient how this test works including considerations regarding test validity <input type="checkbox"/> Answers patient questions as appropriate and refers questions out of their scope to MD				

	<input type="checkbox"/> Reassures patient that now diagnosis is made, this condition can be properly treated <input type="checkbox"/> Shows empathy towards patient				
6.	<p>Demonstrated professional behavior and exhibited appropriate conduct:</p> <input type="checkbox"/> Prioritized tasks; remained organized throughout task <input type="checkbox"/> Communicated with patient appropriately and with ease throughout task <input type="checkbox"/> Documented right away, correctly, and completely on ( <b>Instructor's Note:</b> attach documentation) <input type="checkbox"/> Groomed appearance and appropriate attire				

IV.A.1. Show awareness of patient's concerns regarding a dietary change

<b>COMPETENCY:</b>	<b>IV.A.1. Show awareness of patient's concerns regarding a dietary change</b>
<b>OBJECTIVE(s):</b>	Given the conditions, and provided the necessary supplies, the student will demonstrate awareness of patient concerns regarding a dietary change as they provide patient education in a role-play scenario for a student-partner.
<b>SUPPLIES:</b>	Predetermined case study or patient scenario provided by instructor (for example: patient has just been diagnosed with Pre-diabetes and is told that he must limit his carbohydrate intake – patient voices concern over this as bread and pasta are two of his favorite foods), simulated patient chart (electronic or paper)
<b>TIMEFRAME:</b>	10 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for “ <b>PASS.</b> ” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a “✓” for “ <b>PASS.</b> ”. When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL,</b> ” procedure must be repeated.
<b>WORK PRODUCT:</b>	Documentation in chart
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
7.	Reviewed patient’s chart to identify orders for dietary change				
8.	Correctly prepared the patient: <input type="checkbox"/> Greeted the patient, verified name, introduced self, and escorted him/her to private consultation room. <input type="checkbox"/> Made appropriate eye contact with the patient <input type="checkbox"/> Established a professional and empathetic atmosphere				
9.	Responds to patient concerns: <input type="checkbox"/> Asks patient to state his / her concerns regarding dietary change <input type="checkbox"/> Assures understanding of concerns by repeating them and verifying them with patient <input type="checkbox"/> Explains the rationale for the dietary change and how this will affect their overall health <input type="checkbox"/> Answered any questions from patient <input type="checkbox"/> Refers questions out of the scope of a medical assistant to MD <input type="checkbox"/> Provide resources and educational materials to help patient better understand the reasons for the dietary change <input type="checkbox"/> Suggest to MD consideration of a referral to registered dietician if patient’s concerns persist				
10.	Demonstrated professional behavior and exhibited appropriate conduct: <input type="checkbox"/> Prioritized tasks; remained organized throughout task <input type="checkbox"/> Communicated with patient appropriately and with ease				

	throughout task				
	<input type="checkbox"/> Groomed appearance and appropriate attire				

V.A.1.c. Demonstrate nonverbal communication

<b>COMPETENCY:</b>	<b>V.A.1.c. Demonstrate nonverbal communication</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly, given the conditions, and provided the necessary supplies, the student will demonstrate nonverbal communication when interacting with patients, family, and staff while accurately role-playing with a student partner Scenario: A patient recently diagnosed with lupus, a chronic debilitating disease, comes to the office with a family member (husband, wife, mother, or father) for a follow-up visit. As the medical assistant prepares the patient and verifies the patient’s name and identification. The patient begins to cry, wrings their hands, and makes the following statements: “my father died of this disease,” “my life has changed,” “my husband/wife is very upset.”
<b>SUPPLIES:</b>	Pen
<b>GRADING:</b>	PASS = 100% accuracy; All steps must be completed as written for “PASS.” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written record a “✓” for “PASS.” When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL</b> ,” procedure must be repeated.
<b>TIMEFRAME:</b>	5 minutes
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		

11.	<p>Prepared work area:  *For purposes of this competency, it is presumed that all necessary equipment and supplies are obtained/organized, pre-test requirements are verified, the patient is properly identified and hands are washed as appropriate.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Greeted the patient, introduced self, and reviewed the laboratory request form</li> <li><input type="checkbox"/> Acknowledged family member appropriately when asked by obviously distressed patient if the family member would be allowed to be present, gave empathetic and appropriate response</li> <li><input type="checkbox"/> Explained to patient and family member that office policy required family to remain in waiting room.</li> </ul>				
12.	<p>Demonstrated appropriate nonverbal communication skills when interacting with patient and family member:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> When asked by the patient, “what caused my disease,” made appropriate eye contact, used appropriate facial expressions and touched patient appropriately while answering empathetically</li> <li><input type="checkbox"/> When patient made random distressed statements, again made appropriate eye contact and used appropriate facial expressions while answering appropriately without giving medical advice, false reassurance, and references about self.</li> <li><input type="checkbox"/> Directed patient back to provider for clarification of diagnosis and disease process, prognosis, and support</li> </ul>				
13.	<p>Demonstrated professional behavior and exhibited appropriate conduct:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prioritized tasks; remained organized throughout task</li> <li><input type="checkbox"/> Communicated with patient appropriately and with ease throughout task</li> <li><input type="checkbox"/> Groomed appearance and appropriate attire</li> </ul>				

VI.A.1. Display sensitivity when managing appointments

<b>COMPETENCY:</b>	<b>VI.A.1. Display sensitivity when managing appointments</b>
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<b>OBJECTIVE(s):</b>	<p>With the instructor observing directly, and in a role-play scenario with a student and/or instructor partner, the student will display sensitivity when managing appointments.</p> <p>Patient Scenario: A 72 year old female patient has just been seen by the MD for a serious infection of her right leg. The doctor wants to see her in 2 days to make sure she is starting to respond to the prescribed antibiotics. Her daughter takes her to all appointments and she is trying to schedule the appointment. The MD has a 3:00 opening but the daughter says she has to pick up her son from school at that time. He is a special-needs child and his mom always picks him up. Also, she has to take her father-in-law to the dentist that same day and her husband is out of town this week. The daughter appears somewhat overwhelmed.</p>
<b>SUPPLIES:</b>	Simulated appointment book
<b>GRADING:</b>	<p>PASS = 100% accuracy; All steps must be completed as written for "PASS." Students are permitted two (2) graded attempts.</p> <p><b>Grading Instructions:</b> When step is performed as written record a "✓" for "PASS." When step is omitted and/or there is an error in written procedure, record instructor initials for "FAIL," procedure must be repeated.</p>
<b>TIMEFRAME:</b>	10 minutes
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record "✓" Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
14.	Greeted patient/family member professionally: <input type="checkbox"/> Identified self and confirmed with patient/family member that appointment is needed in two days				

	<input type="checkbox"/> Allowed patient/family member opportunity to express concerns regarding a conflict in scheduling <input type="checkbox"/> Established a professional and empathetic atmosphere				
15.	<p>Display sensitivity while managing appointment:  Considering the above circumstances, identify at least 3 different ways to proceed as you do your best to be sensitive to this overwhelmed family member:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Choose one of the above options and consider the following:</p> <input type="checkbox"/> Used appropriate nonverbal communication skills <input type="checkbox"/> Used appropriate verbal communication skills <input type="checkbox"/> Maintained sensitivity towards patient and family member throughout task <input type="checkbox"/> Asked for permission from provider for any deviation from MD's original order <input type="checkbox"/> Was able to achieve reasonable resolution considering the circumstances.				
16.	Demonstrated professional behavior and exhibited appropriate conduct.				

VII.A.2. Display sensitivity when requesting payment for services rendered

<b>COMPETENCY:</b>	<b>VII.A.2. Display sensitivity when requesting payment for services rendered</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly and provided the necessary supplies, the student will demonstrate professionalism when discussing patient's billing record through role-play with a student-partner using an instructor provided scenario Patient scenario: James Smith, a 27 year old patient has just been seen for a sore throat. When you ask for the \$20 co-pay, he asks if he could send a check in the mail tomorrow. When you check his billing record, you notice that he owes co-pays from 2 other visits. You bring this to your supervisor's attention and she asks you to have a discussion with this patient. Office policy is that co-pay is expected at the time of visit.
<b>SUPPLIES:</b>	Simulated office scenario, encounter form, patient account information reflecting past due balance
<b>TIMEFRAME:</b>	10 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for "PASS." Students are permitted two (2) graded attempts.

	<b>Grading Instructions:</b> When step is performed as written, record a “✓” for “ <b>PASS.</b> ”. When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL,</b> ” procedure must be repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
17.	<p><b>In role-play scenario with student partner performed task accurately, demonstrating sensitivity and professionalism in handling accounts receivable activities with patient:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Made appropriate eye contact with the patient</li> <li><input type="checkbox"/> Established a professional and empathetic atmosphere</li> <li><input type="checkbox"/> Professionally and respectfully reminded patient of office policy that co-pay is due at time of visit</li> <li><input type="checkbox"/> Professionally and respectfully identified to patient that he owes for 2 previous co-pays</li> <li><input type="checkbox"/> Offers suggestions for different payment options (credit card, cash, check)</li> <li><input type="checkbox"/> Allows patient opportunity to voice any unusual circumstances that would limit his ability to pay and <b>he indicates that he lost his job 2 months ago</b></li> <li><input type="checkbox"/> Displays sensitivity to this patient’s circumstances while attempting to negotiate a reasonable resolution to this problem</li> <li><input type="checkbox"/> Achieves reasonable resolution to problem</li> </ul>				

18.	Demonstrated professional behavior and exhibited appropriate conduct: <ul style="list-style-type: none"> <li><input type="checkbox"/> Prioritized tasks; remained organized throughout task</li> <li><input type="checkbox"/> Communicated with staff appropriately and with ease throughout task</li> <li><input type="checkbox"/> Documented right away, correctly, and completely</li> <li><input type="checkbox"/> Groomed appearance and appropriate attire</li> </ul>				
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VIII.A.1. Interact professionally with third party representatives

<b>COMPETENCY:</b>	<b>VIII.A.1. Interact professionally with third party representatives</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly, given the conditions, and provided the necessary supplies, the student will demonstrate professional interaction with third party representative in a role-play scenario with a student partner. Patient scenario: A 45 year old female patient is seen in your office for the first time. She forgot her insurance card but tells you that she is covered by Blue Cross & Blue Shield and asks if you could verify her insurance with the carrier. Your internet connection is down and you must call the insurance company and speak to a third party representative (played by the student-partner).
<b>SUPPLIES:</b>	Simulated telephone, patient information.
<b>TIMEFRAME:</b>	10 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for “PASS.” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a “✓” for “PASS.” When step is omitted and/or there is an error in written procedure, record instructor initials for “FAIL,” procedure must be repeated.
<b>WORK PRODUCT:</b>	Entry in patient’s medical record
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

<b>GRADED ATTEMPT 1</b>	<b>GRADED ATTEMPT 2</b>
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STEP #	PROCEDURE	PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
19.	<p><b>In role-play scenario with student partner playing the role of a 3<sup>rd</sup> party representative, student demonstrates professional interaction.</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Determined patient’s managed care organization and ensured provider was a “participating” provider</li> <li><b>Called insurance company and in a professional manner, obtained correct information including:</b></li> <li><input type="checkbox"/> Identified self &amp; doctor’s office and reason for call</li> <li><input type="checkbox"/> Verified patient has insurance in effect and was eligible for benefits</li> <li><input type="checkbox"/> Confirmed exclusions and non-covered services</li> <li><input type="checkbox"/> Determined deductibles, copayments or other payments the patient is responsible for</li> <li><input type="checkbox"/> Determined policy for referrals to specialists</li> <li><input type="checkbox"/> Used professional communication techniques with third party representative to inquire about coverage</li> <li><input type="checkbox"/> Documented the name, title, and extension of the person contacted</li> <li><input type="checkbox"/> Ended the call politely and professionally</li> <li><input type="checkbox"/> Documented information collected in patient’s medical record or on the appropriate insurance form</li> </ul>				

20.	Demonstrated professional behavior and exhibited appropriate conduct: <ul style="list-style-type: none"> <li><input type="checkbox"/> Displayed professionalism and used appropriate telephone techniques during call</li> <li><input type="checkbox"/> Prioritized tasks; remained organized throughout task</li> <li><input type="checkbox"/> Documented right away, correctly, and completely (<b>Instructor's Note:</b> attach patient's chart entry)</li> <li><input type="checkbox"/> Groomed appearance and appropriate attire</li> </ul>				
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VIII.A.2. Display tactful behavior when communicating with medical providers regarding third party requirements

<b>COMPETENCY:</b>	<b>VIII.A.2. Display tactful behavior when communicating with medical providers regarding third party requirements</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly, using a role-play scenario with a student-partner, the student will demonstrate tactful behavior when communicating with medical providers regarding third party requirements. Scenario: A 65 year old male patient has been coming to your office for wound care for several weeks. You have received several claim rejections from this patient's insurance company because after reviewing the doctor's notes, they state that in order for claims for wound care to be reimbursed, the MD must document the size and depth of each wound. This was not done in the medical record.
<b>SUPPLIES:</b>	None
<b>TIMEFRAME:</b>	5 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for "PASS." Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a "✓" for "PASS.". When step is omitted and/or there is an error in written procedure, record instructor initials for "FAIL," procedure must be repeated.
<b>WORK PRODUCT:</b>	Entry in patient's medical record
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
21.	<b>In role-play scenario with student partner (role playing as provider) displayed tactful behavior when communicating third party requirements</b> <input type="checkbox"/> Approached/addressed provider in a respectful and professional manner <input type="checkbox"/> Brought to provider’s attention rejected claims <input type="checkbox"/> Tactfully explained the reason for rejection <input type="checkbox"/> Offered solution to solve this issue so that future claims would not be rejected <input type="checkbox"/> Answered any questions that provider may have				
22.	Demonstrated professional behavior and exhibited appropriate conduct: <input type="checkbox"/> Displayed professionalism and used appropriate tactfulness when communicating with provider <input type="checkbox"/> Prioritized tasks; remained organized throughout task <input type="checkbox"/> Groomed appearance and appropriate attire				

IX.A.1. Utilize tactful communication skills with medical providers to ensure accurate code selection

<b>COMPETENCY:</b>	<b>IX.A.1. Utilize tactful communication skills with medical providers to ensure accurate code selection</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly, using a role-play scenario with a student-partner, the student will utilize tactful communication skills with medical providers to ensure accurate code selection. Scenario: You have been working for an internal medicine office for several months. There are 5 providers in total and all of them seem very dedicated to their patients and seem to provide quality care. The youngest provider, Dr. Lewis (he just completed his residency 6 months ago), seems to be coding many of the more routine office visits at a high

	level (99214) as opposed to the other providers with comparable visits usually coded at 99212 or 99213. After reviewing the notes for several visits that have been coded at 99214, you believe that the provider is over-coding these visits. Dr. Lewis is very open to suggestions from all co-workers and repeatedly indicates that he knows he is a “rookie” and he wants to do things right.
<b>SUPPLIES:</b>	None
<b>TIMEFRAME:</b>	15 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for “ <b>PASS.</b> ” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a “✓” for “ <b>PASS.</b> ”. When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL,</b> ” procedure must be repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

X.A.2. Protect the integrity of the medical record

<b>COMPETENCY:</b>	<b>X.A.2. Protect the integrity of the medical record</b>
<b>OBJECTIVE(s):</b>	With the instructor observing directly and provided the necessary supplies, the student will demonstrate considerations to protect the integrity of the medical record through role-play with a student-partner using an instructor provided scenario. Patient scenario: Ms. Mills (played by student-partner) is checking out of the office following a routine visit. She says to you, “Hey wasn’t that Sue Smith going into room 4? She’s my next door neighbor.” You then notice that Ms. Mills was leaning over the counter attempting to see the computer screen labeled “Room 4.”
<b>SUPPLIES:</b>	Simulated office setting
<b>TIMEFRAME:</b>	5 minutes
<b>GRADING:</b>	<b>PASS = 100% accuracy;</b> All steps must be completed as written for “ <b>PASS.</b> ” Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written, record a “✓” for “ <b>PASS.</b> ”. When step is omitted and/or there is an error in written procedure, record instructor initials for “ <b>FAIL,</b> ” procedure must be repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the

possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record "✓" Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
23.	<p><b>In role-play scenario with student partner demonstrated ability to protect the integrity of the medical record:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Made appropriate eye contact with the patient</li> <li><input type="checkbox"/> Established a professional and empathetic atmosphere</li> <li><input type="checkbox"/> Respectfully indicated to patient that information located behind the counter (whether computerized or paper) is intended for employees only</li> <li><input type="checkbox"/> Professionally and respectfully reminded patient that personal medical information is private</li> <li><input type="checkbox"/> Indicated that her personal medical information is protected in the same way</li> <li><input type="checkbox"/> Offered to answer any questions that patient has</li> </ul> <p>What suggestions could you offer to the office manager so that similar incidents could be avoided in the future?</p> <p>_____</p> <p>_____</p> <p>_____</p>				

24.	Demonstrated professional behavior and exhibited appropriate conduct: <input type="checkbox"/> Prioritized tasks; remained organized throughout task <input type="checkbox"/> Groomed appearance and appropriate attire				
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XII.A.1. Recognize the physical and emotional effects on persons involved in an emergency situation

<b>COMPETENCY:</b>	<b>XII.A.1. Recognize the physical and emotional effects on persons involved in an emergency situation</b>
<b>OBJECTIVE(s):</b>	Given the conditions, and provided the appropriate scenario, the student will recognize the physical and emotional effects on persons involved in an emergency situation. This may be done as an in-class assignment or a homework assignment. Patient scenario: You work in an urgent care center in a small town. Mr. Al Jones is brought in by a family member who is visibly upset. He is suspected of suffering a heart attack. You know the family because you went to school with their daughter. You are asked to assist the MD and the RN as emergency care is provided for Mr. Jones. As the EMT's prepare to transport Mr. Jones into the ambulance, you hear one of them say, "He's not breathing!"
<b>SUPPLIES:</b>	Computer with internet access
<b>TIMEFRAME:</b>	30 minutes
<b>GRADING:</b>	PASS = 100% accuracy; All steps must be completed as written for "PASS." Students are permitted two (2) graded attempts. <b>Grading Instructions:</b> When step is performed as written record a "✓" for "PASS." When step is omitted and/or there is an error in written procedure, record instructor initials for "FAIL," procedure must be repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily

fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
1.	<p>After researching the physical and emotional effects on persons involved in an emergency situation, answer the following: List at least 3 physical effects on persons in emergency situations (attach additional sheets if needed):</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>List at least 3 emotional effects on persons in emergency situations (attach additional sheets if needed):</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Source(s): _____</p>				
2.	<p>How would the physical and emotional effects be different for the MD, RN, wife, yourself? Attach additional sheets if needed.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>				

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<b>3.</b>	<p>What can you do as a medical assistant to limit the effects of the physical and emotional stress that occurs in this situation? List at least 1 for each person involved. Attach additional sheets if needed.</p> <p>MD: _____</p> <p>RN: _____</p> <p>Wife: _____</p> <p>Yourself: _____</p>				

XII.A.2. Demonstrate self-awareness in responding to an emergency situation

<b>COMPETENCY:</b>	<b>XII.A.2. Demonstrate self-awareness in responding to an emergency situation</b>
<b>OBJECTIVE(s):</b>	<p>Given the conditions, and provided the appropriate scenario, student will demonstrate self-awareness in responding to an emergency situation. This can be done as an in-class assignment or a homework assignment. Scenario: It's 12:55 pm and office hours start at 1:00pm. Your first patient for the afternoon, Mr. Lewis, has already checked in and is waiting for the MD to return from lunch. Suddenly you hear the receptionist exclaim, "Mr. Lewis is having a seizure!"</p>
<b>SUPPLIES:</b>	Computer with internet access
<b>TIMEFRAME:</b>	20 minutes
<b>GRADING:</b>	<p>PASS = 100% accuracy; All steps must be completed as written for "PASS." Students are permitted two (2) graded attempts.</p> <p><b>Grading Instructions:</b> When step is performed as written record a "✓" for "PASS." When step is omitted and/or there is an error in written procedure, record instructor initials for "FAIL," procedure must be</p>

	repeated.
<b>WORK PRODUCT:</b>	None
<b>PRECAUTIONS:</b>	To act in accordance with OSHA regulations appropriate Standard Precautions must be observed when there is the possibility of contact with blood or bodily fluids.

STEP #	PROCEDURE	GRADED ATTEMPT 1		GRADED ATTEMPT 2	
		PASS	FAIL	PASS	FAIL
Ex.	Student <b>completes step</b> as written, record “✓” Student <b>omits step or performs it in error</b> , record initials	✓	<i>JH</i>		
1.	After researching the effects that stress has on the human body, identify at least 3 physical effects and 3 emotional effects that occur: Physical: _____ _____ _____ Emotional: _____ _____ _____ Source(s): _____				
2.	Identify at least 2 different actions or considerations that would assist you in limiting stressful effects in an emergency: _____ _____ _____ Attach additional sheets if needed.				

<p><b>3.</b></p>	<p>Identify at least 3 steps that you would take in regards to the above scenario that would demonstrate self-awareness as you initiate appropriate response to this emergency situation:</p> <hr/> <hr/> <hr/> <p>Attach additional sheets as needed.</p>				
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