

# DACUM Research Chart for Medical Office Assistant

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G R O S S M O N T  
C O L L E G E



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Duties		Tasks									
<b>A</b>	<b>Conduct Phone Triage</b>	A-1 Answer phone calls	A-2 Take detailed messages	A-3 Sort phone messages by urgency	A-4 Dispatch phone calls to correct person	A-5 Schedule patient appointments	A-6 Maintain patient confidentiality	A-7 Document phone call	A-8 Follow-through with phone calls (i.e., make sure concerns are addressed)		A-9 Call patients with instructions/ appointments
		A-10 Return patient phone calls	A-11 Call pharmacy to fill patient prescriptions	A-12 Page physicians as needed							
<b>B</b>	<b>Prepare Patient Appointment Schedule</b>	B-1 Print out daily appointment schedule	B-2 Prepare patient appointment list by time	B-3 Compare patient appointment time vs. "walk-ins"		B-4 Sort charts by appointment time	B-5 "Fit in" walk-in patients into appointment schedule		B-6 Call patient to exam room by schedule		
<b>C</b>	<b>Prepare Patient Charts</b>	C-1 Have patient complete personal information sheet		C-2 Copy insurance / Medi-Cal or Medicare card	C-3 Verify eligibility of insurance / Medi-Cal / Medicare		C-4 Assign patient an account number	C-5 Input patient information into computer	C-6 Create patient chart	C-7 Insert charge ticket (superbill) in front of chart	C-8 Complete patient information on "superbill"
		C-9 Collect patient's "co-payment" or fee	C-10 Place chart in rack / tray to be processed by M.A.								
<b>D</b>	<b>Conduct Patient Appointment Triage</b>	D-1 Check schedule for appointment time	D-2 Verify patient data for current information	D-3 Verify insurance data	D-4 Prepare patient chart for M.D. / N.P. / M.A.	D-5 Verify previous lab reports	D-6 Review referral follow-up	D-7 Call patient into room	D-8 Obtain patient height and weight	D-9 Take patients blood pressure	D-10 Take patients pulse and respirations
		D-11 Take patient's temperature	D-12 Ask patient for chief complaint	D-13 Ask patient about current meds / dosages	D-14 Ask patient about any additional forms that need to be completed						
<b>E</b>	<b>Conduct "Walk-in" Patient Triage</b>	E-1 Determine main complaint of patient	E-2 Determine urgency of complaint	E-3 Obtain patient's height and weight	E-4 Obtain patient's blood pressure	E-5 Take patient's pulse and respirations	E-6 Take patient's temperature	E-7 Notify physician of patient information	E-8 Refer patient to appropriate place as ordered	E-9 Prepare patient for exam by M.D. / N.A. / P. A.	E-10 Assist physician with exam
		E-11 Fill lab orders	E-12 Refer patient to specialist as ordered	E-13 Give instructions to patient / family	E-14 Send to front desk for follow-up appointment						

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Duties		Tasks									
F	<b>Prepare Patient For Exam</b>	F-1 Have patient change into a gown	F-2 Explain exam procedure to patient	F-3 Place patient on bed / table for exam	F-4 Assist M.D. / N.P. / M.A. with exam	F-5 Translate exam procedures to patient	F-6 Fill lab orders	F-7 Follow physician orders	F-8 Instruct patient as ordered by physician on procedures	F-9 Send patient to front desk for follow-up appointment	
		G-1 Place exam procedure supplies on tray	G-2 Stand next to patient	G-3 Assist patient to relax	G-4 Follow M.D. instructions	G-5 Assist M.D. with procedure / exam as required	G-6 Give patient discharge orders	G-7 Assist patient with dressing	G-8 Send patient to front desk for follow-up appointment		
H	<b>Perform Medical (uncomplicated) Procedures</b>	H-1 Check physician orders for given task	H-2 Gather supplies for procedure	H-3 Prepare work area	H-4 Prepare patient for procedure	H-5 Follow OSHA / Infection Control guidelines	H-6 Explain procedure to patient	H-7 Perform procedure (or) assist physician with procedure	H-8 Clean patient after procedure	H-9 Give patient discharge instructions	H-10 Clean / disinfect room
		H-11 Document procedure in chart									
I	<b>Administer Medication to Patient(s)</b>	I-1 Obtain patient history regarding allergies	I-2 Double-check physician orders	I-3 Instruct patient on procedure	I-4 Put on protective gloves	I-5 Prepare medication for administration	I-6 Prepare injection site	I-7 Administer medication	I-8 Discard "dirty" needle in proper container	I-9 Instruct patient on medication side effects	I-10 Observe patient for app. 20 min. for complications
		I-11 Document medication administration site and results	I-12 Discharge patient with instructions								
J	<b>Administer Immunizations</b>	J-1 Prepare patient charts for height and weight	J-2 Began immunization history of patient	J-3 Obtain height, weight, and head circumference of pediatric patient		J-4 Get medical history from parent	J-5 Call in doctor to talk with parent	J-6 Translate for doctor as needed	J-7 Check doctor's orders regarding patient	J-8 Prepare vaccines for patient	J-9 Educate parent or patient regarding procedure
		J-10 Give immunization injection	J-11 Document immunizations administered	J-12 Send to front desk for follow up appointment							
K	<b>Perform Blood Withdrawals</b>	K-1 Determine what tests are needed	K-2 Complete lab order slips	K-3 Verify patient's insurance information	K-4 Verify correct status of patient	K-5 Gather supplies for procedure	K-6 Explain procedure to patient	K-7 Assess how patient will handle lab procedure	K-8 Put patient in appropriate position	K-9 Look for the vein on patient's arm	K-10 M.A. puts on gloves





## **General Knowledge and Skills**

Type  
Computer skills  
Certified Medical Assistant  
C.P.R. Certified  
Accounting experience  
Be able to write legibly  
Phlebotomist (certified)

## **Worker Behaviors**

Good communication skills	Experienced
Phone etiquette	Patience
Good customer service	Professional
Empathy	Neatness
Courteous	Good personal hygiene
Punctual	Work readiness
Dependable	Efficiency
Must have common sense	Good judgment skills
Maintain patient confidentiality	Translate
Teamwork	Knowledge of office equipment
Organized	

## **Tools, Equipment, Supplies and Materials**

Stethoscope  
Blood pressure cuff  
Thermometer  
Uniform  
Watch with second hand  
Shoes (appropriate)  
Protective equipment (i.e., gloves, mask)  
Black ink pens  
Note pads  
Computer/PC  
Phone/Fax  
Exam table  
Surgical equipment

## **Future Trends and Concerns**

Use of computer (replacing people)  
Politics interfering with patient care  
Insurance/cost containment  
Inadequate patient care  
Continuing education requirements  
2003 – Requires certification to work in office  
M.A. is a growing field  
Insurance requires certification

## **Acronyms**

ICD-9	-	Diagnostic Codes
CPT	-	Current Procedure Terms
EKG	-	Electro Cardio Gram
PFT	-	Pulmonary Function Test
IV	-	Intravenous Therapy
PAC	-	Physician Assistant Certified
NP	-	Nurse Practitioner
CMA	-	Certified Medical Assistant
O <sub>2</sub> SAT	-	Oxygen Saturation
Meds	-	Medication