

# **Appendix L**

## **MEDICAL ASSISTANT - MA**

# Health Services Youth Apprenticeship –

## Medical Assistant Course Outcome Summary

### *Course Information*

#### **Description**

The Medical Assistant (MA) Youth Apprenticeship (YA) curriculum was created to allow students to explore an occupation that involves responsibilities in all three Health Science pathways of Diagnostic, Information and Therapeutic Services.

The student will learn concepts and skills in the three Health Science pathways. In the unit "Clerical" the student will master competencies related to the management and running of a medical office or department. Competencies involving records, insurance, and inventory are included. In the unit "Laboratory" the student will master competencies related to assisting with collecting and testing specimens for client medical status evaluation. In the unit "Clinical" the student will work directly with clients in the medical office to assess and assist with procedure administration.

NOTE: This youth apprenticeship is NOT an accredited Medical Assistant Training program for certification as a medical assistant.

Students are REQUIRED to earn Certified Nursing Assistant (CNA) certification through a Wisconsin Department of Health and Family Services (DHFS) approved CNA program with DHFS approved instructors AND take a course in Medical Terminology to participate in this youth apprenticeship. SEE the Health Services YA Program Guide for other Recommended Related Technical Instruction- Appendix C. Coursework chosen should coincide as much as possible with the curriculum to be learned and the student's career goals.

#### **Target Population**

For the student who wishes to work in direct client care in a clinical setting. Medical assistants support physicians and other medical professionals in an outpatient setting by performing a wide variety of duties. The student will perform multiple functions including office administration, direct patient care, and laboratory testing. Certified Nursing Assistant (CNA) training and testing is required for work in this area. The ability to handle multiple tasks, as well as be compassionate, caring, and respectful is essential.

#### **Types of Instruction**

<b>Instruction Type</b>	<b>Contact Hours</b>	<b>Credits</b>
On-The-Job Work Experience	450	
Related Technical Instruction	180	

## **CURRICULUM SOURCES:**

1. Mid-Continent Research for Education and Learning, Career Education, Health Education Standards, 4th edition, printed 2006
2. National Consortium on Health Science and Technology Education, Diagnostic, Information, and Therapeutic Services Knowledge and Skills Charts, 2007
3. National Consortium on Health Science and Technology Education, Diagnostic, Information, and Therapeutic Services Standards and Accountability criteria, 11/18/2002
4. Oklahoma Department of Career and Technology Education, Clinical Medical Assistant Skills Standards, OD7406, 2005
5. Wisconsin Technical College System program information for Medical Assistant 31-509, 4/11/2005
6. Wisconsin Technical College System articulated course curriculum for Medical Assistant Administrative Procedures, 509-301, 4/7/2005; Medical Assistant Laboratory Procedures I, 509-303, 4/7/2005; Medical Assistant Laboratory Procedures II, 509-305, 4/7/2005; Medical Assistant Clinical Procedures I, 509-304, 4/7/2005; Medical Office Insurance and Finance, 509-307, 4/7/2005; Healthcare Reimbursement, 530-185, 11/5/2003
7. Wisconsin's Worknet, Occupational Skills and Tasks for Medical Assistants, 7/5/2006
8. Youth Apprenticeship Medical Assistant Curriculum Review Group, Winter 2006-2007

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## Unit 1: Clerical

### Competency

#### 1. **Manage business documentation functions**

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner follows legal guidelines and prioritization lists for documentation in responding to requests for information
- o Learner routes written, electronic, and oral requests for information, purchase orders, checks, and other business documents to appropriate parties
- o Learner sorts and distributes correspondence accurately
- o Learner addresses and sends requests/correspondence correctly according to department/facility guidelines for inter-office, registered, and certified mail, if applicable

#### Content to Know

##### **Learning Objectives**

- a. Compare and contrast the different methods of mailing: certified, registered, inter-office, first class
- b. Describe how to appropriately address a business envelope
- c. Discuss accounts payable processes (order invoices, shipping, receiving) as they apply to your department/facility
- d. Explain the importance of tracking and monitoring accounts receivable payment for health services
- e. Describe how employee payroll processes are handled in your department/facility

#### **Comments:**

## Unit 1: Clerical

### Competency

#### 2. Create and/or maintain the client record

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite
- o with a client record

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner follows department/facility guidelines for creating and/or maintaining the client record
- o Learner verifies data/information
- o Learner includes/verifies client identification on each record or form used
- o Learner enters/updates required information in the electronic and/or manual client record in accordance with federal regulations and professional standards
- o Learner confirms accuracy of entered/updated client information
- o Learner uses only approved abbreviations on client record
- o Recorded data/information is accurate
- o Recorded information is legible and can be understood by others

#### Content to Know

##### **Learning Objectives**

- a. Explain the legal purposes and ownership of the client record
- b. Describe the content within a typical client record
- c. Compare and contrast the different types and functions of the client record
- d. Define the electronic medical record (EMR)
- e. Discuss the impact of the EMR on healthcare consumers and professionals
- f. Compare and contrast electronic and manual client record systems in your department/facility
- g. List the general guidelines for charting/recording/entering information within your job role
- h. Identify the abbreviations that are approved for use in your department/facility
- i. Describe how to convert time to military time AND why military time is used
- j. Outline the procedure used in a typical health service facility for creating the client record
- k. List the ways in which identification of client documents is confirmed
- l. Explain the use of bar codes for identification in health care settings
- m. Explain the term "routing" as it pertains to manual client record and/or client documents

#### Comments:

## Unit 1: Clerical

Competency

### 3. Complete client identification labels

Performance Standard Condition

**Competence will be demonstrated**

- o at the worksite

Performance Standard Criteria

**Performance will be successful when:**

- o Learner follows department/facility guidelines for making client identification labels
- o Learner enters required information on labels, if applicable
- o Learner prints out applicable labels according to department/facility guidelines
- o Learner confirms accuracy of information
- o Learner applies labels onto client records, materials, and forms as applicable
- o Client Identification Labels are accurate and complete

Content to Know

**Learning Objectives**

- a. Describe the importance of labeling client files and other documents accurately
- b. Explain the use of bar codes used in client identification
- c. Outline the procedure used your facility for making labels for client identification
- d. List the ways in which identification of clients and client documents is confirmed
- e. Explain why accuracy in preparing client identification is important

**Comments:**

## Unit 1: Clerical

### Competency

#### 4. File manual client records

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner verifies signature(s) and/or other required medical information, such as transcription orders, prior to filing
- o Learner follows up to obtain missing signature(s) and/or required medical information as directed, if applicable
- o Learner uses the department/facility filing and indexing guidelines to file manual client records
- o Learner uses the department/facility filing and indexing guidelines to add information to the manual client record
- o Learner files client records/reports/forms promptly and accurately
- o Learner uses the department/facility filing and indexing guidelines to retrieve information from the manual client record
- o Learner correctly documents all forms removed from the manual client record
- o Learner replaces client records as soon as possible after each use
- o Learner assists with any cross referencing file procedures used in the department/facility
- o Learner selects the correct color-coded letters/numbers for color coding a client record
- o Learner applies filing and indexing rules when preparing labels for client documents
- o Learner performs all critical steps in the right order
- o Learner adheres to the requirements for the retention of client records in the department/facility
- o Client Record is filed correctly
- o Client Record contains filed forms/documentation in correct order

#### Content to Know

##### **Learning Objectives**

- a. List the reasons for correct filing of manual client records
- b. Compare indexing and filing methods used for filing in health care organizations
- c. Explain how client records are cross referenced manually and electronically
- d. Explain the reasons for cross referencing and cross indexing
- e. Outline the procedures for finding specific client records/information manually and electronically
- f. Describe the processes for tracking client records that have been removed from the manual files
- g. List the legal guidelines governing retention of documents
- h. Compare retention requirements for manual and electronic documentation

#### **Comments:**

## Unit 1: Clerical

### Competency

#### 5. Perform an inventory of supplies, equipment, and/or medications

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o on the department/facility inventory schedule

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner follows procedure for inventory of supplies, equipment, and/or medications for the department/facility
- o Learner adheres to schedule for completing inventory check
- o Learner checks and accurately records quantity of items available in each category on the inventory
- o Learner reports expired, discontinued, damaged, recalled, and/or missing supplies and/or medications immediately to worksite professional
- o Learner communicates changes in availability to worksite professional
- o Inventory Record is accurate and complete
- o Learner verifies inventory record with worksite professional including special categories of controlled substances and investigational products, if applicable
- o Learner files/stores verified documents according to department/facility guidelines
- o Learner describes computerized tracking of inventory, if applicable
- o Learner assists with removal and disposal of expired, damaged, and/or recalled items as required by department/facility requirements
- o Learner straightens and cleans shelves

### Content to Know

#### **Learning Objectives**

- a. List the importance of and purpose for an inventory of supplies and equipment
- b. Explain the purpose of lot numbers and expiration dates
- c. Identify where supplies, equipment, and/or medications are stored in your department/facility
- d. Name common supplies, pieces of equipment and/or medications used in your department/facility on a routine basis
- e. Note how supplies and/or medications are organized in your department/facility
- f. Discuss the importance of replacing expired supplies and medications
- g. Indicate the type of damage to supplies, equipment, and medications that most frequently occurs
- h. Identify the person(s) responsible for inventory for your department/facility
- i. List the types of agents included in the category of "controlled substances"
- j. Outline some of the regulations for prescription drugs included in the Controlled Substance Act
- k. Explain the variation in procedures when controlled substances are part of the inventory process
- l. Describe the importance of immediate action when medications are found to be missing
- m. List some supplies, substances, and/or medications needing special storage

### Comments:

## Unit 1: Clerical

### Competency

#### 6. Order and receive supplies and equipment

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o on the department/facility schedule OR as directed

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner follows procedures for identifying and procuring supplies, equipment, and/or medications for the department/facility when items are not in stock, outdated, in need, and/or as scheduled
- o Learner obtains appropriate supervisory approvals to place orders
- o Learner refers to the preferred provider legal and contractual requirements to locate supplies for purchase
- o Learner verifies the receipt of a shipment with the order against the packing slip and/or original purchase order after the order arrives
- o Learner updates inventory record with worksite professional including special categories of controlled substances and investigational products, if applicable
- o Learner restocks storage area(s) according to the department/facility guidelines
- o Learner identifies supply items and/or medications requiring special handling or storage and stores the items correctly
- o Learner reports any items received that are expired and/or damaged immediately to worksite professional
- o Learner files or routes warranty and service agreements for equipment to the worksite professional
- o Learner files or routes the Packing Slip and/or any MSDSs received to the appropriate places

##### Content to Know

###### **Learning Objectives**

- a. Discuss the process of ordering and receiving supplies and/or medications in your department/facility
- b. Compare and contrast ordering procedures for routine and for emergency orders
- c. Explain any special procedures required to order equipment
- d. Discuss the issue of cost containment in health care and how that impacts ordering
- e. Describe your role in cost containment in your department/facility
- f. Explain the routing/storage of MSDS (Materials Safety Data Sheet) papers when they arrive with supplies and medications
- g. List items in your department/facility that require any special handling and/or storage
- h. Explain how to store items received so as to prevent loss and damage
- i. Compare and contrast the ordering paperwork: Original Order (Manual or Electronic), Purchase Order, Packing Slip
- j. Describe the purpose of tracking Purchase Orders for goods and services

### Comments:

## Unit 1: Clerical

### Competency

#### 7. Verify insurance information

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client, third party payer, healthcare professional, and/or client record

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner follows department/facility guidelines to verify and/or reconcile electronic insurance information or authorizations
- o Learner reviews claim(s) for incomplete or inaccurate insurance information or authorizations
- o Learner locates and/or requests appropriate information required to complete the insurance claim or authorizations
- o Learner identifies and obtains information to resolve rejected third-party claims
- o Learner verifies revised claim information with worksite professional
- o Learner provides additional information as requested or required within the scope of the job role and HIPAA regulations
- o Learner submits revised claim electronically according to department/facility guidelines

### Content to Know

#### **Learning Objectives**

- a. Define terms used in insurance plans such as third-party payer, deductible, co-payment, HMOs, PPOs
- b. Illustrate the insurance reimbursement cycle
- c. Compare and contrast major types of insurance plans
- d. Compare non-government payers (commercial insurance, managed care) to government payers (Medicare, Medicaid)
- e. Identify advantages and disadvantages of participating and non-participating insurance companies for health care professionals and health care facilities
- f. Explain the purpose of Worker's Compensation and why it is considered a health insurance plan
- g. Discuss issues and trends in insurance plans and health care financing
- h. List the categories of information common to most insurance claims
- i. Describe the information on a typical explanation of benefits (EOB) form
- j. Discuss challenges faced when health insurance limits the amount and type of health care and treatment covered
- k. Discuss issues related to financing preventive care
- l. Explain ways in which long term care is financed

### Comments:

## Unit 1: Clerical

### Competency

#### 8. Manage patient appointments

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client in person OR on the phone

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner ascertains the time required for the health service(s) required by the client
- o Learner refers client to worksite professional and/or department/facility guidelines for priority scheduling to address emergencies and/or urgent care
- o Learner identifies conflicts in department/facility schedule and those of the client's schedule
- o Learner assists in recommending resolution to scheduling conflicts
- o Learner confirms that client and the department/facility have the identical medical appointment information
- o Learner accurately enters appointment times and other required information according to department/facility guidelines manually and/or electronically as applicable
- o Learner prepares an appointment card if client is present
- o Learner documents any scheduling changes in the correct manual and/or electronic locations, if applicable
- o After appointment time, learner documents status of the appointment: late, no show, rescheduled, cancelled, etc. according to department/facility guidelines

##### Content to Know

###### **Learning Objectives**

- a. List the elements about an appointment schedule that are most important to the client
- b. List the scheduling elements of greatest concern to the department/facility
- c. Describe the appointment procedures used in your department/facility
- d. Detail the client information required for most scheduling procedures
- e. Describe the importance of reminder calls for appointments
- f. List the types of calls that indicate a need for immediate service according to your department/facility guidelines
- g. Explain how departments/facilities handle "no show" appointments

### Comments:

## Unit 1: Clerical

### Competency

#### 9. Maintain a cash drawer

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite OR in simulation
- o using a cash drawer OR cash register

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner verifies insurance coverage, deductibles, and co-payments using electronic systems or other means
- o Learner documents disbursements or deposits to the cash drawer in the appropriate record, if applicable
- o Learner processes client cash or credit payment according to department/facility guidelines and insurance coverage
- o Learner skillfully operates cash register, if applicable
- o Learner makes accurate change
- o Cash Drawer balances with the day's receipts and disbursements

#### Content to Know

##### **Learning Objectives**

- a. Define deductible and co-payment as they pertain to health care services
- b. List the requirements for client identification when presenting a check or credit card
- c. Indicate the importance of client verification procedures when accepting check or credit card payments
- d. Describe components of an acceptable check
- e. Explain your department/facility's guidelines for checks
- f. Explain how to operate your facility's cash register, if applicable

#### Comments:

## Unit 2: Laboratory

### Competency

#### 1. **Instruct clients in the collection of stool and/or urine specimens**

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite
- o with a client

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner identifies the client
- o Learner provides privacy for the client
- o Learner explains department/facility instructions for urine collection in words the client understands
- o Learner explains department/facility instructions for fecal collection in words the client understands
- o Learner determines the client's level of understanding about the directions
- o Learner responds to client questions accurately within scope of their job role OR refers to worksite professional
- o Learner obtains consent for testing

#### Content to Know

##### **Learning Objectives**

- a. List medical and lay terms related to bladder and bowel elimination
- b. List the reasons for doing a urinalysis
- c. Outline the procedures for collecting a routine urine specimen, a clean-catch specimen, 24-hour specimen
- d. Describe the procedure for collecting a stool specimen
- e. List some of the tests that will be performed on a stool specimen

#### **Comments:**

## Unit 2: Laboratory

Competency

### 2. Collect stool and urine specimens

Performance Standard Condition

**Competence will be demonstrated**

- o at the worksite
- o with a client

Performance Standard Criteria

**Performance will be successful when:**

- o Learner provides privacy for the client
- o Learner explains collection procedure to client in words the client understands
- o Learner follows department/facility guidelines for collecting stool and/or urine specimens noting client safety and Standard Precautions
- o Learner accurately labels specimen
- o Learner completes/cosigns paperwork/requisition for collecting and processing specimen
- o Learner delivers specimen, arranges for pickup, or stores specimen for later
- o Learner cleans/disinfects equipment and supplies and disposes of contaminated articles according to department/facility guidelines using Standard Precautions

Content to Know

**Learning Objectives**

- a. Discuss the use of Standard Precautions while collecting and handling specimens
- b. Explain why a urine specimen should be tested immediately
- c. Indicate the reasons for care in labeling the specimen
- d. Describe any special storage and handling requirements for urine and stool samples.

**Comments:**

## Unit 2: Laboratory

### Competency

#### 3. Assist in collecting specimens other than urine/fecal

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client
- o while assisting a worksite professional

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner verifies sample to be collected/processed
- o Learner identifies client
- o Learner provides privacy for the client
- o Learner assists worksite professional to explain collection procedure to client in words the client understands
- o Learner obtains consent for testing
- o Learner assists with collection of specimen according to department/facility guidelines noting client safety and Standard Precautions
- o Learner labels OR confirms that the specimen is labeled accurately and completely
- o Learner completes/cosigns paperwork/requisition for collecting and processing specimen
- o Learner delivers specimen, arranges for pickup, or stores specimen for later
- o Learner cleans/disinfects equipment and supplies and disposes of contaminated articles according to department/facility guidelines using Standard Precautions

##### Content to Know

###### **Learning Objectives**

- a. Discuss the use of Standard Precautions while collecting and handling specimens
- b. Name the specimens collected most frequently in your department/facility
- c. Review the department/facility procedures for collecting specimens for your facility's specific tests
- d. Name the equipment and special supplies used for collecting specimens
- e. Explain any special pediatric patient requirements for collecting specimens
- f. List the preparatory steps the client must take prior to collection of specimens for your facility's specific tests
- g. Describe your role in the collection and processing of specimens
- h. Describe the appropriate labeling and storage requirements for specimens
- i. Explain the purpose of a throat specimen
- j. Describe the appropriate anatomical site in the throat to swab on adults and children
- k. Explain the purpose of capillary puncture
- l. Locate appropriate anatomical sites for capillary punctures on adults and infants
- m. Explain the purpose of venipuncture
- n. List the required equipment and supplies needed to perform a venipuncture
- o. Locate appropriate anatomical sites for venipuncture on adults, children, and infants
- p. Differentiate between different types of specimens including whole blood, serum, plasma, and sputum
- q. Compare and contrast the different types of vacuum tubes and anticoagulants with blood component to be tested
- r. Compare and contrast needles according to gauge, type, and use

##### **Comments:**

## Unit 2: Laboratory

### Competency

#### 4. Assist in performing macro-urinalysis

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client urine specimen
- o while assisting a worksite professional

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner locates and identifies the urine specimen to be tested
- o Learner assists with testing of the urine specimen according to department/facility guidelines using Standard Precautions
- o Learner selects the correct equipment and supplies
- o Learner includes QC samples, if applicable
- o Learner verifies counts, measurements, and/or color reactions with the worksite professional
- o Learner cosigns the recording of the test results
- o Learner screens test results for follow up with the worksite professional
- o Learner cleans/disinfects equipment and supplies and disposes of contaminated articles according to department/facility guidelines using Standard Precautions

##### Content to Know

###### **Learning Objectives**

- a. List the most common tests used to determine characteristics of urine
- b. Compare testing methods of urine testing
- c. Describe normal values and conditions resulting in abnormal test results
- d. Explain quality control and assurance issues in urine testing
- e. Explain storage and disposal procedures

##### **Comments:**

## Unit 2: Laboratory

### Competency

#### 5. Assist in performing laboratory testing

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client specimen
- o while assisting a worksite professional

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner locates and identifies the specimen to be tested
- o Learner assists with the testing of the specimen according to department/facility guidelines using Standard Precautions
- o Learner selects the correct equipment and supplies
- o Learner includes QC samples, if applicable
- o Learner verifies counts, measurements, and/or color reactions with the worksite professional
- o Learner cosigns the recording of the test results
- o Learner screens test results for follow up with the worksite professional
- o Learner cleans/disinfects equipment and supplies and disposes of contaminated articles according to department/facility guidelines using Standard Precautions

##### Content to Know

###### **Learning Objectives**

- a. Define the terms associated with common tests performed on specimens
- b. Explain the purpose of common tests performed on specimens
- c. Explain testing requirements for common tests performed in your department/facility
- d. List the principles of medical asepsis that are applicable for those processing the specimen
- e. Explain your role when assisting with the measuring/testing of specimens
- f. Describe tests that will be performed on a stool specimen
- g. Explain the purpose(s) of performing a microbiology test
- h. Describe growth requirements
- i. Describe common culture media
- j. Explain the procedure for tuberculin skin testing
- k. Describe common allergy tests
- l. List the most common tests used to measure the blood and its components, normal values, and conditions resulting in abnormal results
- m. Describe common chemistry tests, normal values, and conditions resulting in abnormal test results
- n. Describe the procedure for cholesterol testing
- o. Describe the procedure for glucose testing
- p. Describe the procedure for drug testing including collection, screening, and chain of custody
- q. Indicate the importance of clean up of the area and equipment after processing the specimen
- r. Describe appropriate specimen storage and disposal procedures

##### **Comments:**

## Unit 2: Laboratory

### Competency

#### 6. Maintain and QC lab equipment

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with diagnostic testing equipment and/or supplies

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner identifies Maintenance/QC schedule for equipment and/or supplies that produce test results
- o Learner identifies equipment and/or supplies that require maintenance/QC
- o Learner labels equipment appropriately to show malfunction, if applicable
- o Learner identifies location of repair service information, maintenance manuals, and/or troubleshooting guides
- o Learner verifies procedure to follow with worksite professional
- o Learner performs/calls service for routine maintenance or malfunction according to department/facility guidelines in accordance with equipment manual/maintenance instructions and service agreements
- o Learner documents the maintenance and/or repair/troubleshooting performed
- o Learner performs routine QC procedures according to department/facility guidelines in accordance with equipment manual/maintenance instructions using Standard Precautions
- o Learner reviews QC results with worksite professional to verify function of equipment/supplies
- o Learner accurately documents the QC performed
- o Learner cleans and maintains equipment and work areas

##### Content to Know

###### **Learning Objectives**

- a. Explain why performing routine maintenance of equipment reduces the risk of liability and costs to the facility
- b. Describe the basic procedure to be followed when a piece of equipment is not functioning properly in your department/facility
- c. Discuss how tracking of equipment maintenance and servicing is done in the department/facility
- d. Review each piece of equipment's cleaning and maintenance schedule
- e. List the critical pieces of equipment in your department/facility which require priority repairs when malfunctioning
- f. Discuss the need for quality control (QC) samples and/or equipment controls in diagnostic testing
- g. Define positive and negative control
- h. Describe the function and requirements of different regulatory agencies for diagnostic testing procedures
- i. Describe how equipment function is monitored through QC processes
- j. Explain how each machine functions to perform lab tests
- k. Identify the equipment and/or supplies in your department/facility that require QC
- l. Describe how analysis of statistics from QC results shows equipment functionality
- m. List the repair and service contractors that service your department/facility and what they service

##### **Comments:**

## Unit 3: Clinical

### Competency

#### 1. Obtain client record information

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite OR in simulation
- o with a client

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner identifies client
- o Learner ensures client privacy
- o Learner uses therapeutic communication techniques to obtain basic client information
- o Learner verifies client information in easy to understand language
- o Learner obtains and reports/records the required information

#### Content to Know

##### **Learning Objectives**

- a. List the ways in which identification of clients is confirmed
- b. Explain why accuracy in client identification is important
- c. Explain the use of bar codes for identification in health care settings
- d. Explain reasons for obtaining a thorough patient history
- e. Explain therapeutic communication techniques for obtaining a thorough patient history
- f. Detail the common medical history components of the client record

#### **Comments:**

## Unit 3: Clinical

### Competency

#### 2. Chart objective information on client records

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite OR in simulation
- o with a client

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner records measured vital data or responses/reactions within the scope of their job according to department/facility guidelines
- o Learner records data/information in the appropriate place
- o Learner uses only abbreviations on the facility's approved list
- o Learner verifies recorded information with worksite professional, if required
- o Learner reports any physical and/or emotional changes to the worksite professional immediately
- o Recorded data/information is accurate
- o Recorded information is legible and can be understood by others
- o Recorded information is free of spelling and number errors

##### Content to Know

###### **Learning Objectives**

- a. Explain the role of observations in client care
- b. List some of the most critical client care observations to be made
- c. Enumerate the changes in client physical and emotional status that should be reported
- d. Identify the individual to whom client changes should be reported
- e. Describe general documentation requirements for recording objective information and client observations
- f. Relate charting/recording by worksite professionals to the broad process of communications and liability
- g. Discuss the quality issues to be addressed when writing narrative descriptions of client's care and reaction to care

##### **Comments:**

## Unit 3: Clinical

### Competency

#### 3. Position client

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner identifies client
- o Learner provides privacy for the client
- o Learner explains procedure to the client
- o Learner secures assistance, if needed, before beginning to move and turn client
- o Learner changes client position on schedule or as needed for a procedure/care noting client safety, proper body mechanics, and Standard Precautions
- o Learner seeks client input to determine their comfort with the position
- o Learner makes observations about condition of the skin in bed-confined clients, if applicable
- o Learner assures that there are no skin-on-skin surfaces touching in bed-confined clients, if applicable
- o Learner gives skin care to potential or existing pressure areas in bed-confined clients, if applicable
- o Learner reports/records client condition, reactions, and position change

##### Content to Know

###### **Learning Objectives**

- a. Outline the general structure and function of the musculoskeletal system
- b. Describe proper body alignment
- c. Explain the importance for proper body alignment to the client
- d. Describe turning and moving a client using correct body mechanics
- e. Describe the use of pillows or other comfort devices for various positions
- f. List some of the devices used to maintain position of legs and feet and to help in hand and finger positioning
- g. Describe the observations about the client's condition and reactions that should be reported/recorded during positioning
- h. Explain some of the procedures used to avoid skin-on-skin contact and pressure
- i. Outline the problems that can be caused by bed rest and immobility of the client
- j. Elaborate on the effects immobility can have on the cardiovascular, musculoskeletal, respiratory, gastrointestinal, urinary and integumentary systems
- k. List the basic positions for a client confined to bed
- l. Detail the importance of changing client position on a regular schedule for bed-confined clients
- m. Explain the skin care that must accompany a change of position in bed-confined clients

### Comments:

## Unit 3: Clinical

### Competency

#### 4. Measure temperature, pulse, and respirations

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner identifies client
- o Learner provides privacy for client prior to procedure
- o Learner prepares the equipment for the procedure
- o Learner explains the procedure to the client in words the client can understand
- o Learner positions client using proper body mechanics if necessary
- o Learner takes client temperature, pulse, and respirations according to department/facility guidelines noting client safety and Standard Precautions
- o Learner takes temperature by the method ordered or as directed by worksite professional
- o Measurements of the client temperature are within +/- 0.2 degrees of the worksite professional's reading
- o Measurements of the client pulse are within +/- 4 beats of worksite professional's reading
- o Measurements of the client respirations are within +/- 2 of the worksite professional's reading
- o Learner reports/records temperature, pulse, and/or respiration readings
- o Learner cares for thermometer according to department/facility guidelines
- o Learner reports abnormal readings immediately to worksite professional

##### Content to Know

###### **Learning Objectives**

- a. Outline the general structure and functions of the circulatory and respiratory systems
- b. Define terminology related to temperature, pulse and respiration
- c. Identify the range of normal values for each of the vital signs
- d. Explain the techniques for obtaining vital signs
- e. Locate pulse sites
- f. List descriptive characteristics of the pulse and respiration
- g. Describe the various methods for measuring body temperature
- h. Differentiate the different types of thermometers
- i. Explain how to use each type of thermometer
- j. Discuss how to read a thermometer accurately
- k. Describe the care of thermometers
- l. Describe factors that influence temperature, pulse and respiration readings
- m. Explain how to document vital signs results
- n. Determine when vital signs should be reported immediately

##### **Comments:**

## Unit 3: Clinical

### Competency

#### 5. Measure blood pressure

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner identifies client
- o Learner provides privacy for client prior to procedure
- o Learner prepares the equipment for the procedure
- o Learner explains the procedure to the client in words the client can understand
- o Learner positions client using proper body mechanics if necessary
- o Learner takes blood pressure according to department/facility guidelines noting client safety and Standard Precautions
- o Measurements of the client blood pressure are within +/- 4 mm Hg of the worksite professional's reading
- o Learner reports/records blood pressure reading(s)
- o Learner cares for the sphygmomanometer and stethoscope according to department/facility guidelines
- o Learner reports abnormal readings immediately to worksite professional

##### Content to Know

###### **Learning Objectives**

- a. Define terms related to blood pressure
- b. Describe how to use and care for the sphygmomanometer and stethoscope
- c. Explain the technique for obtaining blood pressure
- d. Discuss variations of equipment choice for different size clients
- e. Identify the range of normal values for blood pressure
- f. Describe factors that influence blood pressure readings
- g. Identify the causes of inaccurate blood pressure readings
- h. Identify the variations in blood pressure readings that should be reported immediately
- i. Explain how to document blood pressure results

##### **Comments:**

## Unit 3: Clinical

### Competency

#### 6. Measure client weight and height

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite
- o with a client

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner identifies client
- o Learner provides privacy for client prior to procedure
- o Learner prepares equipment for the procedure
- o Learner explains the procedure to the client in words the client can understand
- o Learner positions client using proper body mechanics if necessary
- o Learner measures weight and height according to department/facility guidelines noting client safety and Standard Precautions
- o Learner reports/records weight and height reading(s)
- o Weight and Height measurements are accurate
- o Learner cares for equipment according to department/facility guidelines

#### Content to Know

##### **Learning Objectives**

- a. Define terms related to weight and height measurements
- b. Describe the various methods for measuring client weight
- c. Explain how to convert pounds to kilograms
- d. Explain how to convert inches to centimeters
- e. Identify different methods of measuring client weight
- f. Explain how to document weight and height measurements

#### Comments:

## Unit 3: Clinical

### Competency

#### 7. Set up area for client procedures

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite
- o in the appropriate procedure area

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner verifies procedure to be performed
- o Learner consults the department/facility guidelines for the procedure and its setup requirements
- o Learner gathers the equipment and supplies that will be used for the procedure
- o Learner ensures the cleanliness of the procedure equipment and area/room
- o Learner checks the equipment for malfunction or damage if applicable and allowed
- o Learner reads labels to confirm that any solutions and supplies are correct and not expired
- o Learner arranges the equipment and supplies in the order in which they will be used
- o Learner has materials ready prior to the start of the procedure
- o Learner reports the status of supplies and equipment to the worksite professional
- o Learner documents procedure set up, if applicable

### Content to Know

#### **Learning Objectives**

- a. Identify the therapeutic and diagnostic procedures most commonly administered in your department/facility
- b. Describe the major purpose for each of the procedures identified
- c. List the types of equipment and supplies that are required for each of the procedures identified
- d. Define the medical terms and abbreviations related to each of the procedures identified
- e. Explain the equipment and supplies sterilization requirements for each of the procedures identified
- f. Detail the importance of equipment and supply checks before procedures
- g. Explain the importance of a clean environment and clean equipment in the procedure room or area
- h. Detail how the room/area will be set up to facilitate easy access to necessary equipment and supplies
- i. Define surgical asepsis, sterile field and describe how test supplies can be contaminated
- j. Explain how to set up a sterile field
- k. Explain how to handle contaminated materials

### Comments:

## Unit 3: Clinical

### Competency

#### 8. Assist in explaining procedures to client

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o while assisting a worksite professional
- o in the appropriate procedure area
- o with a client scheduled for a procedure

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner reviews the purpose and the steps of the procedure with the worksite professional before assisting with client instruction
- o Learner discusses with the worksite professional the role of this procedure in the client's total therapeutic and/or diagnostic plan
- o Learner identifies client
- o Learner provides for client privacy
- o Learner helps the worksite professional determine the client's level of understanding about the procedure, its purpose, and the process
- o Learner observes the worksite professional in outlining the procedural protocol for the client
- o Learner assists the worksite professional in outlining any preparatory steps that must be taken by the client before the test
- o Learner assists the worksite professional in describing to the client the equipment and/or supplies that will be used during the procedure
- o Learner Explanations are in words the client understands
- o Learner observes worksite professional checks for client comprehension during the instructions/explanation
- o Learner assists worksite professional to obtain consent for procedure
- o Learner documents (cosigns) presence while procedure was explained to client
- o Learner discusses client response(s) with the worksite professional after the procedure

##### Content to Know

###### **Learning Objectives**

- a. Explain any pretest steps that must be taken by the client in preparation for each common therapeutic and diagnostic procedure performed in your department/facility
- b. Discuss the legal responsibility of the worksite professional to explain procedures
- c. Explain your role when the procedure is explained to the client by the worksite professional
- d. Explain how to document Informed Consent
- e. Discuss the legal and liability issues of Informed Consent in regards to procedures
- f. Explain why it is critical that the client understands the purpose of the procedure and the steps that will be followed
- g. Outline the importance of using words and terms that the client can understand when explaining the procedure
- h. Detail any client follow up conducted after each common procedure identified in your department/facility

### Comments:

## Unit 3: Clinical

### Competency

#### 9. Assist in administering procedures

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o while assisting a worksite professional
- o in the appropriate procedure area
- o with a client scheduled for a procedure

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner identifies client
- o Learner assists the worksite professional to review the purpose and the steps of the procedure with the client in words the client understands
- o Learner verifies that the area, equipment, and supplies are appropriate, in-date, and ready for the procedure
- o Learner drapes client and/or takes other measures to assure client privacy during the procedure
- o Learner assists in positioning client using proper body mechanics
- o Learner assists with procedural steps performed by the worksite professional noting client safety and Standard Precautions
- o Learner exhibits empathy for client during the procedure
- o Learner monitors and reports any client response to the procedure to the worksite professional
- o Learner labels and processes specimens when applicable
- o Learner documents (cosigns) assistance while procedure was performed
- o Learner cleans/disinfects and/or sterilizes equipment and supplies and disposes of contaminated articles according to department/facility guidelines using Standard Precautions as applicable
- o Learner communicates any follow up information to the client as directed by the worksite professional

##### Content to Know

###### **Learning Objectives**

- a. Describe the responsibility of the worksite professional for administering the procedure
- b. Explain your role when assisting with the procedure
- c. Discuss ways you can reassure the client before, during, and after the procedure
- d. List ways you can comfort a client who is fearful, anxious, or in pain during a procedure
- e. Identify the position(s) necessary for the client during each common therapeutic and diagnostic procedures performed in your department/facility
- f. Detail how client privacy is maintained during each common procedure identified
- g. List the principles of medical asepsis that are applicable during each common procedure identified
- h. Explain how equipment and/or supplies are sterilized for each common procedures identified
- i. Outline potential adverse client reactions to each common procedure identified
- j. Describe the positive results expected from each common procedure identified
- k. Explain how to document procedure administration

##### **Comments:**

## Unit 3: Clinical

### Competency

#### 10. Monitor client response to procedures

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite
- o with a client
- o before, during and/or after the administration of a procedure

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner positions self during procedure so as to make the necessary observations of client reactions
- o Learner notes verbal and nonverbal client responses
- o Learner does not exhibit inappropriate non-verbals
- o Learner observes for signs of client distress--physical and psychological
- o Learner reports client distress symptoms to worksite professional immediately
- o Learner accurately reads client's vital signs, if applicable to monitoring in the procedure
- o Learner documents observations of client response to treatment following department/facility guidelines

##### Content to Know

###### **Learning Objectives**

- a. Outline the importance of monitoring clients during a procedure
- b. List the physical and psychological signs to be observed during a procedure
- c. Describe the signs/symptoms that indicate a client in distress
- d. Explain the value of measuring vital signs, especially heart rate and blood pressure, during some procedures
- e. Identify how your department/facility handles client emergency situations
- f. Discuss the importance of documenting any reactions/responses to a procedure including follow up care

##### Comments:

## Unit 3: Clinical

### Competency

#### 11. Assist with the administration of topical and/or oral medications

##### Performance Standard Condition

###### **Competence will be demonstrated**

- o at the worksite OR perform all steps in simulation
- o with a client
- o while assisting a worksite professional

##### Performance Standard Criteria

###### **Performance will be successful when:**

- o Learner verifies with worksite professional that the topical and/or oral medication has been ordered
- o Learner provides privacy for the client
- o Learner observes worksite professional with performance of the "six rights" before beginning medication administration
- o Learner observes worksite professional with performance of the "three checks" during the medication administration
- o Learner positions client using proper body mechanics if necessary
- o Learner observes worksite professional explain administration procedure to the client
- o Learner observes worksite professional administer medication to the client
- o Learner assists worksite professional with monitoring of client response to the medication administration

### Content to Know

#### **Learning Objectives**

- a. Outline the steps ("Six Rights") for assuring accuracy in applying the topical medication (Right Drug, Dose, Client, Route, Time, Documentation)
- b. Outline the steps ("Three Checks") for assuring identity of the correct medication (at storage removal, at container removal, at storage return)
- c. Explain how to document topical and oral medication administration
- d. Review general structure and function of the integumentary and digestive system
- e. List some of the most frequent topical and oral medications that are used in your department/facility and their purpose, expected outcome, and common side effects
- f. List the various forms of oral medications
- g. List the various forms in which topical medications are supplied
- h. Discuss conditions which contraindicate the use of oral medications
- i. Identify conditions of the skin that should be observed when giving client care
- j. Explain the importance of applying medications to skin that is not broken

### Comments:

## Unit 3: Clinical

### Competency

#### 12. Assist with the administration of parenteral medications or immunizations

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o at the worksite OR perform all steps in simulation
- o with a client
- o while assisting a worksite professional

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner verifies with worksite professional that the parenteral medication or immunization has been ordered
- o Learner provides privacy for the client
- o Learner observes worksite professional with performance of the "six rights" before beginning the administration
- o Learner observes worksite professional with performance of the "three checks" during the administration
- o Learner positions client using proper body mechanics if necessary
- o Learner observes worksite professional explain administration procedure to the client
- o Learner assists worksite professional to disinfect the injection site using Standard Precautions
- o Learner observes worksite professional administer medication to the client
- o Learner assists worksite professional with monitoring of the injection site and client response to the medication administration

### Content to Know

#### **Learning Objectives**

- a. Outline the steps ("Six Rights") for assuring accuracy in applying the topical medication (Right Drug, Dose, Client, Route, Time, Documentation)
- b. Outline the steps ("Three Checks") for assuring identity of the correct medication (at storage removal, at container removal, at storage return)
- c. Explain how to document parenteral and immunization administration
- d. Review the general structure and function of the circulatory system as it pertains to parenteral medications and immunizations
- e. List some of the most frequent parenteral medications and immunizations that are used in your department/facility and their purpose, expected outcome, and common side effects
- f. Compare and contrast procedures for giving immunizations versus parenteral medications
- g. Describe appropriate injection sites for subcutaneous, intramuscular, intradermal, intravenous injections for adults and children
- h. Explain the process for disinfecting the injection site for different anatomical sites
- i. Describe the reasons medications drawn up from vials for one client are not used for another client
- j. Describe why medication drawn up from vials cannot be replaced back into the vial
- k. List the signs and symptoms of a life threatening reaction to parenterals and immunizations
- l. Discuss needle re-capping and safety issues and engineering controls related to needle re-capping

### Comments:

## Unit 3: Clinical

### Competency

#### 13. Perform choking maneuver

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o on a manikin

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner successfully competes an approved course on choking maneuvers
- o Learner accurately assesses the choking situation based on simulated description of the person's symptoms OR on role play of choking by a peer
- o Learner identifies the obstruction as partial or complete, matching symptoms to the simulated situation
- o Learner immediately contacts emergency care specialist or designates someone to get help
- o Learner performs choking maneuver for a simulated conscious person and an unconscious person according to course guidelines noting client safety, proper body mechanics, and Standard Precautions

#### Content to Know

##### **Learning Objectives**

- a. Describe the general structure and function of the respiratory system
- b. Define terms related to airway obstruction
- c. Explain how the tongue and foreign objects can cause airway obstruction
- d. List the signs of someone with a partial airway obstruction
- e. List the signs of someone with a complete airway obstruction
- f. Outline the steps of the choking maneuver for a conscious person
- g. Outline the steps of the choking maneuver for an unconscious person
- h. Describe the variations in the maneuver for an infant and a child

#### Comments:

## Unit 3: Clinical

### Competency

#### 14. Perform CPR

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o on a manikin

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner successfully completes an approved CPR course for the health care professional
- o Learner accurately assesses the condition of the victim by checking for breathing and for a pulse
- o Learner immediately contacts emergency care specialist or designates someone to get help
- o Learner checks and clears the victim's airway following the guidelines in the CPR course
- o Learner(s) administers CPR (one person and two person), doing both chest compressions and ventilation, following the guidelines given in the CPR course noting client safety, proper body mechanics, and Standard Precautions
- o Learner cleans the manikin after the procedure is completed

#### Content to Know

##### **Learning Objectives**

- a. Define terms related to CPR (Cardiopulmonary Resuscitation)
- b. Give the purpose for CPR
- c. List the "ABCs" guides for CPR
- d. Summarize each of the steps in the process that make up the "A", "B", and "C"s of CPR
- e. Outline the steps necessary to evaluate the victim's condition before starting CPR
- f. Describe correct hand placement on the victim's chest for compression
- g. List the different ways CPR can be administered
- h. Discuss the relationship of cardiac compressions and ventilation processes used in CPR
- i. Highlight the major differences in administering CPR to a child or infant than those measures used with the adult
- j. Describe the special measures that are required if the victim has an obstructed airway
- k. Describe the purpose and use of the AED
- l. Explain why CPR is practiced only on a manikin
- m. Outline the method of cleaning the manikin after use for CPR

#### **Comments:**

## Unit 3: Clinical

### Competency

#### 15. Respond to basic emergencies with first aid measures

#### Performance Standard Condition

##### **Competence will be demonstrated**

- o in a simulation(s) of an emergency/injury in a health care facility

#### Performance Standard Criteria

##### **Performance will be successful when:**

- o Learner successfully completes an approved First Aid course
- o Learner accurately assesses the simulated emergency situation(s)
- o Learner immediately contacts emergency care specialist or designates someone to get help
- o Learner gives appropriate immediate care to the injured client in the simulated situation(s)
- o Learner applies principles of client safety, proper body mechanics, and Standard Precautions in administering any first aid according to course guidelines
- o Learner performs only those techniques in the simulated emergency that were included in the first aid course

#### Content to Know

##### **Learning Objectives**

- a. Define terms related to emergency care
- b. Identify types of emergency situations which might occur in your department/facility that would require immediate aid
- c. Compare and contrast signs and symptoms of common emergency situations such as for bleeding/wounds, shock, poisoning, burns, fractures, fainting, heart attack, stroke, convulsions and diabetic reactions
- d. Relate the importance of thorough observation and assessment with beginning first aid
- e. List the general principles which should guide your decision making in an emergency situation
- f. List the "priorities of care" which need attention before beginning other first aid procedures
- g. Describe first aid or immediate measures for: bleeding/wounds, shock, poisoning, burns, fractures, fainting
- h. Describe immediate emergency care to be given for heart attack, stroke, convulsions and diabetic reactions
- i. Explain the your role in providing first aid in the health care facility
- j. Elaborate on the importance of only giving the emergency care you are qualified to provide

#### Comments: