

COMPETENCY-BASED OCCUPATIONAL FRAMEWORK FOR REGISTERED APPRENTICESHIP

Medical Assistant

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Competency-Based Occupational Frameworks

The Urban Institute, under contract by the U.S. Department of Labor, has worked with employers, subject matter experts, labor unions, trade associations, credentialing organizations and academics to develop Competency-Based Occupational Frameworks (CBOF) for Registered Apprenticeship programs. These frameworks defined the **purpose** of an occupation, the **job functions** that are carried out to fulfill that purpose, the **competencies** that enable the apprentice to execute those job functions well, and the **performance criteria** that define the specific knowledge, skills and personal attributes associated with high performance in the workplace. This organizational hierarchy – Job Purpose – Job Functions – Competencies – Performance Criteria – is designed to illustrate that performing work well requires more than just acquiring discrete knowledge elements or developing a series of manual skills. To perform a job well, the employee must be able to assimilate knowledge and skills learned in various settings, recall and apply that information to the present situation, and carry out work activities using sound professional judgement, demonstrating an appropriate attitude or disposition, and achieving a level of speed and accuracy necessary to meet the employer’s business need.

The table below compares the terminology of Functional Analysis with that of traditional Occupational Task Analysis to illustrate the important similarities and differences. While both identify the key technical elements of an occupation, Functional Analysis includes the identification of behaviors, attributes and characteristics of workers necessary to meet an employer’s expectations.

Framework Terminology	Traditional Task Analysis Terminology
Job Function – the work activities that are carried out to fulfill the job purpose	Job Duties – roles and responsibilities associated with an occupation
Competency – the actions an individual takes and the attitudes he/she displays to complete those activities	Task – a unit of work or set of activities needed to produce some result
Performance Criteria – the specific knowledge, skills, dispositions, attributes, speed and accuracy associated with meeting the employer’s expectations	Sub Task – the independent actions taken to perform a unit of work or a work activity

Although designed for use in competency-based apprenticeship, these Competency-Based Occupational Frameworks also support time-based apprenticeship by defining more clearly and precisely apprentice is expected to learn and do during the allocated time-period.

CBOFs are comprehensive in to encompass the full range of jobs that may be performed by individuals in the same occupation. As employers or sponsors develop their individual apprenticeship programs, they can extract from or add to the framework to meet their unique organizational needs.

Components of the Competency-Based Occupational Framework

Occupational Overview: This section of the framework provides a description of the occupation including its purpose, the setting in which the job is performed and unique features of the occupation.

Work Process Schedule: This section includes the job functions and competencies that would likely be included in an apprenticeship sponsor’s application for registration. These frameworks provide a point of reference that has already been vetted by industry leaders so sponsors can develop new programs knowing that they will meet or exceed the consensus expectations of peers. Sponsors maintain the ability to customize their programs to meet their unique needs, but omission of a significant number of job functions or competencies should raise questions about whether or not the program has correctly identified the occupation of interest.

Cross-cutting Competencies: These competencies are common among all workers, and focus on the underlying knowledge, attitudes, personal attributes and interpersonal skills that are important regardless of the occupation. That said, while these competencies are important to all occupations, the relative importance of some versus others may change from one occupation to the next. These relative differences are illustrated in this part of the CBOF and can be used to design pre-apprenticeship programs or design effective screening tools when recruiting apprentices to the program.

Detailed Job Function Analysis: This portion of the framework includes considerable detail and is designed to support curriculum designers and trainers in developing and administering the program. There is considerable detail in this section, which may be confusing to those seeking a more succinct, higher-level view of the program. For this reason, we recommend that the Work Process Schedule be the focus of program planning activities, leaving the detailed job function analysis sections to instructional designers as they engage in their development work.

- a. **Related Technical Instruction:** Under each job function appears a list of foundational knowledge, skills, tools and technologies that would likely be taught in the classroom to enable the apprentice’s on-the-job training safety and success.

- b. Performance Criteria: Under each competency, we provide recommended performance criteria that could be used to differentiate between minimally, moderately and highly competent apprentices. These performance criteria are generally skills-based rather than knowledge-based, but may also include dispositional and behavioral competencies.

Using the Competency-Based Occupational Framework to Develop a Registered Apprenticeship Program

When developing a registered apprenticeship program, the Work Process Schedule included in this CBOF provides an overview of the job functions and competencies an expert peer group deemed to be important to this occupation. The Work Process Schedule in this document can be used directly, or modified and used to describe your program content and design as part of your registration application.

When designing the curriculum to support the apprenticeship program – including on the job training and related technical instruction – the more detailed information in Section 5 could be helpful. These more detailed job function documents include recommendations for the key knowledge and skill elements that might be included in the classroom instruction designed to support a given job function, and the performance criteria provided under each competency could be helpful to trainers and mentors in evaluating apprentice performance and insuring inter-rater reliability when multiple mentors are involved.

Medical Assistant Occupational Overview

Occupational Purpose and Context

Medical Assistants work in medical offices and outpatient care centers, including urgent care centers and surgical centers. They work with a range of licensed health care and allied health care providers, including doctors, optometrists, podiatrists, chiropractors, nurse practitioners, physician's assistants, nurses, radiology technicians, respiratory therapists and office support staff (such as clerical office staff). Medical assistants can work in small medical practices that employ only the physician and a single medical assistant, or they can work in larger medical practices and outpatient care centers (including those affiliated with hospitals).

Medical Assistants work with licensed medical care providers in medical offices or other outpatient centers to maintain office records and equipment, schedule and participate in the examination and treatment of patients, performing basic diagnostic tests or medical procedures as allowed by state and federal law, and providing patient education and follow-up support.

Potential Job Titles

Certified Medical Assistant, Chiropractor Assistant, Clinical Assistant, Doctor's Assistant, Medical Assistant, Medical Office Assistant, Ophthalmic Technician, Registered Medical Assistant

Attitudes and Behaviors

Medical assistants must be patient, caring, non-judgmental, empathetic individuals who can build trust and maintain confidentiality. They must pay attention to details and follow procedures with fidelity.

Apprenticeship Prerequisites

There are no prerequisites for medical assistant apprenticeships, although some sponsors may require a criminal background check and drug testing as part of their screening process.

Occupational Pathways

Medical assistants who complete additional postsecondary education (in some cases including an associate or bachelor's degree and completing licensure or certification exams) can move into higher level health professions, such as practical nurse, registered nurse or other allied health professionals, such as radiology technician or ultrasound technician.

Certifications, Licensure and Other Credential Requirements

CREDENTIAL	Offered By	Before, During or After Apprenticeship
CPR/First Aid	American Red Cross	Before or During
Phlebotomy	National Center for Competency Testing; American society of Phlebotomy Technicians; National Health Career Association	Before or During
Certified Medical Assistant	American Association of Medical Assistants – only those who complete an apprenticeship program offered in conjunction with an ABHES- or CAHEEP-accredited academic program may sit for the CMA exam	After
Registered Medical Assistant	American Registry of Medical Assistants	After
Certified Clinical Medical Assistant	National Health Career Association	After
Certified Medical Office Assistant	National Health Career Association	After
National Certified Medical Assistant	National Center for Competency Testing	After

Podiatric Medical Assistant	American Society of Podiatric Medical Assistants	After
Certified Ophthalmology Assistant	Joint Commission on Allied Health Personnel in Ophthalmology	After

Job Functions

JOB FUNCTIONS		Core or Optional
1.	Communicates with others to collect, share, record and report information properly	Core
2.	Manages “front end” of medical office	Core
3.	Assists medical professionals and patients during examinations and procedures	Core
4.	Carries out basic medical procedures	Core
5.	Collects and prepares samples for analysis	Core

Work Process Schedule

WORK PROCESS SCHEDULE		ONET Code: 31.9092.00
Medical Assistant		RAPIDS Code: 1085
JOB TITLE:		
Company Contact: Name		
Address:	Phone	Email
Apprenticeship Type: <input type="checkbox"/> Competency-Based <input type="checkbox"/> Time-Based <input type="checkbox"/> Hybrid	Prerequisites	
JOB FUNCTION 1: Communicates with others to collect, share, record and report information properly		
Competencies	Core or Optional	
Schedules appointments	Core	
Greets and logs in patients at office or clinic	Core	
Determines and records medical history and reason for current appointment/visit/procedure	Core	
Provides patient instructions, information and education	Core	
Phones, faxes or uses electronic system to order or refill prescriptions	Core	

JOB FUNCTION 2: Manages “front end” of medical office	
Competencies	Core or Optional
Collects payments or co-payments and bills insurance companies	Core
Maintains office files	Core
Properly codes medical diagnoses, treatments and therapies for patient billing and third-party payer purposes	Core

JOB FUNCTION 3: Assists medical professionals and patients during examinations and procedures	
Competencies	Core or Optional
Shows patient to examination or procedure room and prepares them for physician	Core
Hands instruments to care-providers, as needed, and assists in examinations, treatments and procedures, as needed	Core
Records notes during exam or procedure	Core

JOB FUNCTION 4: Carries out basic medical procedures	
Competencies	Core or Optional
Gives injections based on care provider’s orders	Core
Cleans and dresses wounds	Core
Administers medications per licensed care provider's order	Core
Removes sutures	Core
Performs irrigation techniques: ear, eyes, nose, medical tubing, wounds, medical pumps and devices	Core
Takes vital signs	Core

JOB FUNCTION 5: Collects and prepares samples for analysis	
Competencies	Core or Optional
Collects samples using sterile techniques	Core

Performs in-office testing	Core
Properly labels and sends samples to analytical laboratory	Core
Records results of tests and analysis	Core

Related Technical Instruction Plan

COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	
COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	
COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	

COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	
COURSE NAME	Course Number
	Hours
LEARNING OBJECTIVES	

Cross-Cutting Competencies

		COMPETENCY**								
		0	1	2	3	4	5	6	7	8
Personal Effectiveness	Interpersonal Skills									
	Integrity									
	Professionalism									
	Initiative									
	Dependability and Reliability									
	Adaptability and Flexibility									
	Lifelong Learning									
Academic	Reading									
	Writing									
	Mathematics									
	Science & Technology									
	Communication									
	Critical and Analytical Thinking									
	Basic Computer Skills									
Workplace	Teamwork									
	Customer Focus									
	Planning and Organization									
	Creative Thinking									
	Problem Solving & Decision Making									
	Working with Tools & Technology									
	Checking, Examining & Recording									
	Business Fundamentals									
	Sustainable									
	Health & Safety									

**Cross-cutting competencies are defined in the Competency Model Clearinghouse:

<https://www.careeronestop.org/CompetencyModel/competency-models/buidling-blocks-model.aspx>

Cross-Cutting Competencies identify transferable skills – sometimes called “soft skills” or “employability skills” – that are important for workplace success, regardless of a person’s occupation. Still, the relative importance of specific cross-cutting competencies differs from occupation to occupation. The Cross-Cutting Competencies table, above, provides information about which of these competencies is most important to be successful in a particular occupation. This information can be useful to employers or intermediaries in screening and selecting candidates for apprenticeship programs, or to pre-apprenticeship providers that seek to prepare individuals for successful entry into an apprenticeship program.

The names of the cross-cutting competencies come from the U.S. Department of Labor’s Competency Model Clearinghouse and definitions for each can be viewed at:

<https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx>

The scoring system utilized to evaluate the level of competency required in each cross cutting skill aligns with the recommendations of the Lumina Foundation’s Connecting Credentials Framework. The framework can be found at: <http://connectingcredentials.org/wp-content/uploads/2015/05/ConnectingCredentials-4-29-30.pdf>

Detailed Job Functions

JOB FUNCTION 1: Communicates with others to collect, share, record and report information properly

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Basic understanding of medical symptoms and diagnoses • Medical terminology, anatomical terms, abbreviations and acronyms • Names of pharmaceuticals and terminology used to communicate dosage and strength of medication • Routine treatment regimes, diagnostic tests, medical procedures • HIPAA rules and regulations regarding patient privacy • Rules for working with minors; authorization of care, patient privacy, etc. 	<ul style="list-style-type: none"> • Scheduling • Speaking Clearly • Listening actively 	<ul style="list-style-type: none"> • Telephone systems (including computer-based systems), electronic mail, scheduling software • Electronic medical records

Competency A: Schedule appointments	Core or Optional
PERFORMANCE CRITERIA	
1. Answers phone or responds to email promptly	Core
2. Determines urgency of appointment based on office protocols	Core
3. Determines whether scope of practice is appropriate for patient (i.e. is a referral from a general practitioner needed)	Core
4. Schedules the patient following office policies and procedures regarding appointment time and duration based on the nature of the visit	Core
5. Provides patient with clear instructions regarding appointment date and time, office location and preparation required for medical appointment or procedure	Core
6. Provides accurate information about insurance plans accepted by care provider	Core

7. Correctly phones/faxes in approved prescription refills	Core
8. Multi-tasks calmly while remembering the identity and needs of callers on each phone line, politely asking callers to hold when necessary, switching attention between callers and in-office patients	Core
Competency B: Greets and logs in patients at office or clinic	Core or Optional
PERFORMANCE CRITERIA	
1. Greets patients in a positive way and logs them in to the office appointment management system	Core
2. Pulls patient chart and puts it in the correct place	Core
3. Shows patient to waiting area and provides information on approximately how long the wait will be	Core
4. Monitors patient behaviors and conditions to identify urgent care needs, ensure patient comfort and handle dissatisfied or disruptive patients or family members	Core
Competency C: Determines and records medical history and reason for current appointment, visit or procedure	Core or Optional
PERFORMANCE CRITERIA	
1. Accurately repeats or summarizes instructions provided by care provider to patient	Core
2. Assesses patient understanding of the information provided	Core
3. Identifies and provides to patients appropriate educational materials as indicated by care provider	Core
4. Accurately answers questions about diagnosis, prognosis, diagnostic tests or procedures ordered by care provider and within the scope of practice standards	Core
Competency E: Phones, faxes or uses electronic system to order or refill prescriptions	Core or Optional
PERFORMANCE CRITERIA	
1. Accurately communicates name of medication	Core
2. Spells name of medication correctly	Core
3. Accurately communicates correct dosage, frequency and number of refills	Core
4. Accurately communicates any special instructions related to prescription	Core

JOB FUNCTION 2: Manages “front end” of medical office

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> Office fee schedules Insurance reimbursement rates, policies and restrictions Controls to prevent medical fraud Legal documents: Do Not Resuscitate Orders, Living Wills, Durable Power of Attorney Procedures for reporting medical, insurance or financial misconduct or abuse 	<ul style="list-style-type: none"> Basic arithmetic Spelling, grammar and punctuation Scheduling Completing forms Communication by phone, email and in person 	<ul style="list-style-type: none"> Billing software Electronic communication devices including computers, fax machines and copying machines Medical records software

Competency A: Collect payments or co-payments and bills insurance companies	Core or Optional
PERFORMANCE CRITERIA	
1. Correctly records duration of appointment, tests and procedures performed, and medical diagnostic code	Core
2. Collects correct payment or co-payment from patient	Core
3. Submits accurate forms and supporting information to insurance companies	Core
4. Monitors payments/patient accounts and follows up as necessary with patients and insurance companies	Core
Competency B: Maintains office files	Core or Optional
PERFORMANCE CRITERIA	
1. Maintains orderly and organized files based on office policies	Core
2. Adheres to patient privacy laws and regulations	Core

3. Adds diagnostic test results, medical reports and reports from referring care providers as received	Core
4. Copies and sends medical records as authorized by care providers and patients	Core
Competency C: Determines and records medical history and reason for current appointment, visit or procedure	Core or Optional
PERFORMANCE CRITERIA	
1. Reviews patient charts to ensure that they are complete	Core
2. Checks diagnosis and treatment codes to confirm accuracy	Core
3. Assures that billing codes match treatment record codes	Core
4. Consults with care provider if discrepancies or errors are identified	Core

JOB FUNCTION 3: Assists medical professionals and patients during examinations and procedures

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Infection control and sterile technique • Treatment or exam preparation requirements • Anatomical terminology • Medical terminology • Medical ethics and patient privacy laws and regulations 	<ul style="list-style-type: none"> • Hand-washing and disinfecting techniques • Maintaining a sterile field • Maintaining medical instruments and equipment • Site preparation including cleansing, shaving, wound debridement • Patient gowning, draping and positioning techniques and protocols • Use of medical instruments and equipment • Sterilization procedures (autoclave, disinfection, UV sanitation, etc.) 	<ul style="list-style-type: none"> • Electric exam tables • Medical instruments

Competency A: Shows patient to examination or procedure room and prepares them for physician	Core or Optional
PERFORMANCE CRITERIA	
1. Ensures that room is properly heated or cooled for patient comfort	Core
2. Shows patient to room and prepared for physician in timely manner	Core
3. Provides proper instructions for gowning	Core
4. Properly drapes patient for examination or treatment	Core
5. Prepares skin/treatment area for examination or procedure	Core
Competency B: Hands instruments to care providers, as needed, and assists in examinations, treatments and procedures, as needed	Core or Optional
PERFORMANCE CRITERIA	
1. Stocks treatment or exam room with appropriate equipment and supplies	Core

2. Sterilizes/cleans instruments prior to and after use	Core
3. Employs disease-prevention techniques	Core
4. Anticipates needed instruments and has them ready for use	Core
5. Identifies and handles instruments correctly	Core
6. Collects specimens using appropriate collection devices	Core
7. Sends specimens to appropriate laboratory for analysis	Core
8. Cleans up exam room and restocks supplies as necessary	Core
Competency C: Records notes during exam or procedure.	Core or Optional
PERFORMANCE CRITERIA	
1. Records notes according to medical protocols (i.e. SOAP notes) accurately and in a timely manner	Core
2. Completes forms for diagnosis, billing and laboratory specimens	Core
3. Records vital signs	Core
4. Labels specimens correctly	Core
5. Records care provider instructions for after-treatment and follow-up care	Core
6. Uses correct spelling and grammar	Core

JOB FUNCTION 4: Carries out basic medical procedures

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Normal ranges for vital signs (adult, pediatrics) • Anatomical terms: bone projections, muscle groups, dermal and subdermal structures • Sterile technique and infection control • Mathematics: proportions, ratios, conversion factors • Immunology/allergies • OSHA regulations for storing medication and chemicals and disposing of hazardous waste 	<ul style="list-style-type: none"> • Measure blood pressure, pulse and respirations • Measure height and weight (including for pediatrics and non-ambulatory patients) • Measure respiratory volumes • Dressing and wrapping techniques • Administer injections • Calculate and measure dosages based on patient weight or age • Convert between metric and English measurement systems • Measure volume using syringes, graduated cylinders, volumetric flasks, collection vessels 	<ul style="list-style-type: none"> • Syringes and needles • Nebulizers • IV equipment, including IV pumps • Suture removal kits • Dressings and splints

Competency A: Gives injections based on care provider's orders	Core or Optional
PERFORMANCE CRITERIA	
1. Selects proper syringe and needle sizes and combinations	Core
2. Follows infection control/sterile technique procedures	Core
3. Accurately calculates and measures dosages	Core
4. Administers injections in appropriate sites, using proper technique, based on the type of medication (e.g. intramuscular, intradermal and subcutaneous)	Core
5. Utilizes pain reduction/management techniques to reduce patient discomfort	Core
6. Gives injections using proper sterile technique, administering correct dosage with appropriately sized needles and syringes and using acceptable injection sites	Core

Competency B: Cleans and dresses wounds	Core or Optional
PERFORMANCE CRITERIA	
1. Reviews patient allergies and selects dressing materials accordingly	Core
2. Gathers appropriate dressing supplies	Core
3. Uses appropriate protective equipment including gloves, eyewear, facial mask, etc.	Core
4. Removes soiled dressings properly, minimizing disruption to wound, and disposes of used materials appropriately	Core
5. Cleans wound using appropriate solutions or medications	Core
6. Dresses wound appropriately using correct materials and wrapping techniques	Core
Competency C: Administers medications per licensed care provider's order	Core or Optional
PERFORMANCE CRITERIA	
1. Uses sterile techniques, infection control protocols and personal protective equipment	Core
2. Selects correct medication in correct form (liquid, injectable, cream, suppository, tablet/pill, inhalant, etc.	Core
3. Draws up or dispenses correct dosage based on medical orders and patient age/weight	Core
4. Administers medication correctly	Core
5. Cleans up, removes residual, dresses administration site	Core
Competency D: Removes sutures	Core or Optional
PERFORMANCE CRITERIA	
1. Selects appropriate suture/staple removal kit or instruments	Core
2. Cleans site prior to removal	Core
3. Removes sutures/staples quickly, minimizing patient discomfort and protecting integrity of wound	Core
4. Inspects wound following removal of sutures/staples	Core
5. Dresses site appropriately	Core

6. Uses disease prevention techniques and personal protective precautions (gloves, eye wear, etc.)	Core
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Competency E: Performs irrigation techniques: ear, eyes, nose, medical tubing, wounds, medical pumps and devices	Core or Optional
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PERFORMANCE CRITERIA	
1. Uses sterile techniques, infection control protocols and personal protective equipment	Core
2. Selects correct medication in correct form (liquid, injectable, cream, suppository, tablet/pill, inhalant, etc.)	Core
3. Draws up or dispenses correct dosage based on medical orders and patient age/weight	Core
4. Administers medication correctly	Core
5. Cleans up, removes residual, dresses administration site	Core

Competency F: Takes vital signs	Core or Optional
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PERFORMANCE CRITERIA	
1. Takes temperature orally, rectally, or using skin probe, ear thermometer	Core
2. Takes blood pressure	Core
3. Measures height	Core
4. Measures weight	Core
5. Performs respiratory tests if needed	Core

JOB FUNCTION 5: Collects and prepares samples for analysis

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Sterile technique/sterile field • Respiratory system • Urinary system • Circulatory system • Reproductive system • Digestive system • OSHA requirements for storage of materials and disposal of hazardous waste/bodily fluids and tissues 	<ul style="list-style-type: none"> • Phlebotomy • Skin prick/capillary puncture • Swabbing to take microbiological sample • Clean catch techniques • Catheter care 	<ul style="list-style-type: none"> • Glucometer • PPD • Urinalysis • PAP/wet mount • Pregnancy tests (urine) • AIDs testing: handling materials and results • HgbA1C (glycosylated hemoglobin) • Vision testing/hearing testing • Fecal occult blood testing • Collecting samples for parasite testing • Rapid strep test/rapid flu test • Sputum samples • EKG • Hematocrit • PKU • Hemoglobin

Competency A: Collects samples using sterile techniques	Core or Optional
PERFORMANCE CRITERIA	
1. Gathers necessary supplies to collect, transport and store sample	Core
2. Instructs patients on clean catch procedure	Core
3. Swabs to collect wound, throat, nasal cultures	Core
4. Sets up and affixes pathology slides	Core
5. Selects appropriate collection vials and needles to collect blood samples	Core
Competency B: Performs in-office testing	Core or Optional
PERFORMANCE CRITERIA	
1. Follows instructions for performing test	Core
2. Positions patient properly to perform test or collect samples	Core
3. Explains test to patient as necessary	Core

4. Records results and informs licensed care provider	Core
5. For EKG, places electrodes properly, sets up equipment and collects reading	Core
Competency C: Properly labels and sends samples to analytical laboratory	Core or Optional
PERFORMANCE CRITERIA	
1. Collects and preserves sample according to laboratory instructions	Core
2. Labels sample properly	Core
3. Completes lab requisition form appropriately	Core
4. Arranges for sample pick-up or delivery to lab	Core
Competency D: Records results of tests and analysis	Core or Optional
PERFORMANCE CRITERIA	
1. Identifies correct patient record for recording results	Core
2. Enters results properly, flagging abnormal results for care provider	Core
3. Notifies patients of results if instructed to do so by care provider	Core
4. Identifies missing data or test results or incorrect results and notifies care provider	Core



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