



Please place a check next to each area once you have been able to complete the test independently with no questions and feel you are fully trained in the specified area. This list will aid in determining areas of additionally needed training and allow your trainer and administration to determine your status.

Task	Completed Independently (MA Initials)	Trainer Approved (Trainer's Initials)
Stock room with all necessary supplies		
Prep charts 72 hours ahead including confirmation of all ordered items such as lab results, special studies, x-rays, etc.		
Escort patients to the exam room and obtain all vitals including weight, height, blood pressure, pulse, respirations (if needed) and temperature. Document all vitals in patient's chart.		
Retrieve and record all necessary patient information in the nursing screen while rooming the patient including medication w/strength/directions and specified if discontinued, allergies, contraception, surgeries, PMH, Immunizations and family history.		
Properly prepare patient for examination		
Properly reconcile outside data into chart		
Set room up for annual wellness exam		
Clean room after annual exam		
Process patient specimens for send out		
Respectfully remind provider of time when behind		
Pull voicemails and record them in chart		
Document all interaction regarding patient care in patient chart including conversations, requests, and fulfillment		
Retrieve electronic faxes		
Fill prescriptions using prescription protocol specific to provider		
Assign lab results with designated follow up appointment date		
Place patient on park		
Screen patient for needed utilities such as EKG, PFT, Immunizations, etc. If patient fits protocol, write these out for provider approval prior to performing.		
Perform EKG (Demonstrate procedure, demonstrate documentation/ordering, review pictures etc.)		
Perform Nebulizer Treatment (Demonstrate procedure, demonstrate documentation/ordering, etc.)		
Perform Ear Irrigation (Demonstrate procedure. demonstrate documentation etc.)		
Administer immunization and notate appropriate date for CDC form in patient file. Order and document immunization in patient chart.		
Log all procedures/immunizations on utility log w/2 patient identifiers		
Documenting a nurse visit		
Follow up scheduling		
Adding a patient to the Recall List		
Review Supply Ordering Process		
Autoclave Training		
Discuss lab orders (In house lab, same day appts, ordering process, etc.)		

Discuss Vitality Success Program ( What it is, how it works, how to schedule, etc.)		
Scheduling		
Patient Attrition (Discuss importance of scheduling f/u appts)		
Fax/escribe (E-fax)		
Properly close/open the Oxygen Tank		
Perform Intramuscular Injection		
Perform Testosterone/Estradiol Self Injection Teaching		
Perform Subcutaneous Injection		
Crash bag location		
AED location		
Pediatric Vitals		
Run urine analyzer and collect a urine sample using a vacutainer		
Replacing the regulator on the oxygen tank (demonstrate proper use)		
Demonstrate how to assist with a sterile procedure		
Read SOP		

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Employee Signature

Date