

### Medical Assistant Checklist

**Team Member Name:**

**Signature:**

**Week / Date:**

Instructions: Select and fill out Roomer / Desk (or both) Duties for the appropriate day. Complete Daily and Weekly ALL Team Members Duties. **ONLY FILL OUT WHAT YOU COMPLETE.**

Desk Duties	Monday	Tuesday	Wednesday	Thursday	Friday	Notes
Listen and work voicemails. *Ensure all patients get call back same day*						
Work ALL buckets: admin, clinical doc, lab/imaging, patient cases						
Process Refills Daily						
Process incoming ppwk, mail etc.						
Assist provider with daily needs (procedures etc)						
verify PA's are back for procedures (as well as supplies needed for procedures)						
Prep charts 72 hours ahead, review day ahead for any changes.						
Keep provider bucket open, refill non controlled meds based off provider preference. Following up with Provider when applicable.						
Clean room in between patients						
Set up for paps/procedures						
Roomer Duties	Monday	Tuesday	Wednesday	Thursday	Friday	Notes
Room patients - per providers specifications						
Assist with procedures as time allows between rooming						

Assist with providers desk duties as time allows between rooming						
Open exam room and ensure tidy and ready for the day						
Stock rooms, checking expiration date						
Check utility room and bathrooms have been cleared for any urine samples before leaving for the day						
Clean exam rooms end of day and check bio bins.						
<b>All Team Members</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>	<b>Notes</b>
<b>PRACTICE SERVICE EXCELLENCE</b>						
Keep up to date in Athena Comm Thread						
Tidy utility and storage rooms-clear boxes						
Organzie/Declutter/Dust your workspace						
Document Injections/Procedures in chart and Utility Log						
Checking phone messages before leaving for day, ensuring a team member is handling anything remaining in messages or patient cases before you leave if for some reason you cannot complete them. This is for ALL team members						
Daily - sterilize and package all autoclave items YOUR provider uses. Ensure ready for autoclave processing.						
<b>WEEKLY DUTIES:</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>	<b>Notes</b>
Process weekly retention report-turn in report with checklist and status of each pt on report						

Turn in weekly Utility +MA Log - ensure all items are documented appropriately						
Place ppwrk to scan in reception						
RESTART COMPUTER AT LEAST ONCE PER WEEK						
Check rooms and stock as needed per inventory list in each exam room.						
Check expiration dates on all items while stocking and properly dispose of expired items.						

revised 11.6.25 KI