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 multiple times a day. *Ensure all patients get call back same day						
Work Patient Cases and Med RF's						
Work lab/imaging, clinical doc, admin buckets						
Process incoming ppwk, mail, check providers inbox at reception						
Assist provider with daily needs (procedures etc)						
Prep charts 72 hours ahead, review day ahead for any changes						
Check provider's personal bucket						
48hr post procedure care call to patient						
Take out provider shred						
Roomer Duties	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Notes**
Room patients - per providers specifications						
Assist with providers desk duties as time allows between rooming						
Open exam room and ensure tidy and ready for the day						
Set up AWE/clean room after. Help set up for procedures if time allows.						
Clean exam rooms end of day and check bio bins.						
All Team Members	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Notes**
PRACTICE SERVICE EXCELLENCE						
Keep up to date in Athena Comm Thread						

Sterilize and package all autoclave items YOUR provider uses. Ensure ready for autoclave processing.						
Check utility room and bathrooms have been cleared for any urine samples before leaving for the day						
Organzie/Declutter/Dust your workspace						
Document Injections/Procedures in chart and Utility Log						
RESTART COMPUTER AT LEAST ONCE PER WEEK						
Check rooms and stock as needed in each exam room. Check expiration dates. Tidy utility and storage rooms-clear boxes						
Process weeky retention report-turn in report with checklist and status of each pt on report						

revised 9/8/2026 KI