Date: _____

MA: _____

Provider: _____

MA should review at first week of site orientation/while shadowing and fill out with dyad provider upon second week of working together. It should be reviewed and updated after 3 months of working together. For each item, please discuss **where/how** to document and/or **how** to communicate each item so your team member knows you completed the task. *SO: Standing orders for MAs – circle if dyad agrees to use

	Adult Patients					
1	Task	ICD 10	Where/how to document			
	All Adult Patients					
	Introduce self and your role					
	Have translation line ready for provider (if applicable)					
	Forms and screening questions:					
	Stay Healthy Assessment	[]	CG			
	Handout: SHA hand out or					
	 Leave in room for provider to discuss with patient or other: 					
			CG:			
	Depression screening: PHQ-2 [SO]	[]	PHQ temp/HPI or			
	□ If positive, enter PHQ-9 score and inform provider					
	 If "suicide question" is positive, notify provider verbally 					
	 If past score of >5, rescreen in one yr 		CG:			
	□ If past score of >10, then rescreen every visit or	[]	AUDIT-c template			
	Alcohol abuse screening: AUDIT-c SBIRT [SO]	LJ	Nobil e template			
	If score of, then WHO to BHW or for SBIRT and inform		Shx			
	provider					
	Tobacco use	[]				
	Prepare Advance Directive if >65 yrs for provider to discuss					
	Vaccines:		CG:			
	 TDap [SO] Flu (during season) [SO] 		IZ temp			
	Screening tests for ages 50-75: Colorectal cancer screening: FOBT [SO] or colonoscopy 	r 1	CG:			
	Ask: hx of colonoscopy or Fhx of colon cancer	[]				
	□ If No to both: order FOBT [SO]		Orders module			
	□ If Yes to Fhx: inform provider by					
	 If Yes to colonoscopy: request record 		scan ROI			
	 If the to colonoscopy, request record If unsure of colonoscopy date/location: order FOBT 					
	 If ordered, but not completed: 					
	□ If FOBT order >3 mos., remind patient					
	 If FOBT order >6 mos., needs new order 					
	 How to instruct/educate patient: see standing order and protocol 					
	Ask patient:					
	□ Update		Demographics			
	□ Pharmacy info					
	□ Allergies					
	Take out all medicines/administer *medication inventory		Med Inventory Temp			
	□ Chief complaint					

Explore more than "follow-up" response			
No more than # of reasons			
Encourage patient to prioritize			
Other:			
Patient handouts:			
Other:			
New Establish Care Patients (all of the above, plus) Forms			
 Male/female health history, including family history 			
Ask where and when last care was received for:			
□ PCP			
 Request records release 			Scan ROI
 Dental care 			
Eye exam			
Female Patients			
Screening test for ages 21-65:			
 Cervical cancer screening: Ask where, when, and results of last Pap smear 			HPI or
Request records release			Scan ROI
 If last Pap <3 yrs and always normal, update HCM (in CG or CDSS) 			CG
If last Pap >3 yrs and always normal, ask if they want to complete today or			
make appt for well women's exam			HPI or
if ever abnormal but not due for Pap, document/inform provider			
if ever abnormal and due for Pap, ask if they want to complete today or			
make appt for women's well exam			HPI or
 Ask when last menses occurred and whether regular/absent 			HPI or
Ask birth control type			
document/inform provider if not on BCM and <45 yrs			
Screening test for ages 50-74:			
Breast cancer screening: Ask where, when, and results of last Mammogram			CG
Request records release			Scan ROI
Order if >2 yrs and no history of abnormal [SO]	1	1	Order module
Inform provider if last was abnormal, ask if they want to complete today	-	-	HPI or
Screening test for ages 65 and older			
 Osteoporosis screening: Ask where, when, and results of last Dexa 			CG
Request records release			Scan ROI
Order if never done [SO]	1	1	Orders module
Female Exams:			
 Request to undress before or after provider sees patient 			
 Chaperone for male providers (*see LL policy) 			
Set up: *see procedure reference guide			
 Well woman exam 			
Pelvic exam			
Special needs:			
Patient handouts:			
Male Patients			
Male Exams: Will request to undress before or after provider sees patient for (type of exams):			
Patient handouts:	_		

	Pediatric Patients		
1	Task	ICD-10	Where/how to document
	Newborn Visit		
	Make sure hospital discharge notes are in chart		
	Offer parents flu shot		
	Add to Birth History to EHR template: Time of birth (provider unable to chart without this info entered)		Birth history template
	 Birth weight 		Dirtin history template
	 Head circumference 		
	 Discharge weight 		
	 APGARS scoring at 1 and 5 minute 		
	 Gestational age 		
	 Method of delivery 		
	 Other pertinent info 		
	 Vitamin K, eye drops and hearing test 		
	 Bilirubin level and jaundice risk 		
	Add to IZ template		
	 Enter Hepatitis B #1 if given at hospital 		
	Vital signs		
	 Weight/length w/out diaper 		
	Calculate % weight loss, WHO to: if >%		
	Head circumference		
	Possible WHO to lactation consultant (if applicable):		
	- reasons for WHO:		
	Inform parents about (if applicable)::		HPI or
	 Perform Edinburgh Postnatal Depression scale for mother 		
	 Centering parenting 		
	 Schedule circumcision (\$200) 		
	WIC referral		
	Patient handouts:		
	 First 5 Newborn kit NexGen's patient education material for newborns 		
	- Nexden's patient education material for newborns		
	Well Child Checks		
	Confirm patient is due for well child check		
	(4 days, 2 weeks-1 month, 2 months, 4 months, 6 months, 9 months, 12 months, 15		
	months, 18 months, 2 years, 30 months, then annual)		
	Print out CAIR and compare with EHR/IZ card		
	Verify state newborn screen result – obtain if not in chart Fill out CHDP (for WCC and IZ only visits)		
	□ BMI%		
	 Head circumference 		
	□ ICD-10 code		
	Screening tools and Questionnaires:		
	 Stay Healthy assessment 	[]	CG
	□ 0-6mo, 7-12 mo,1-2yo, 3-4 yo, 5-8 yo, 9-11 yo, 12-17 yo		
	 ASQ at 9 mo, 18 mo and 30 mo (ensure correct age) 	[]	Screening tools
	\square MCHAT at 24 mos.	[]	Screening tools
	 PHQ-2 for >11 yrs old 		PHQ temp
	 TB risk assessment for 12 mo and 24 mo [SO] 		TB risk asses temp
l			

	Sports physical : Cardiovascular questionnaire			
Vital si	gns			
	Temperature			
	Head Circumference for <2 yo			
	Weight/length			
	Pulse for > 6mo			
	BP for >3 years			
Vision	screening: Snellen for >3 yo [SO]	[]	CG
	Ages 3-6: Use shapes from 10 ft			Office diagnostics
	Ages 7+: Use letters or E chart from 20 ft			
	If unable:			
Hearin	g screening: Audiometry for >3 yo [SO]	[]	CG
	If unable:			Office diagnostics
Dental		[]	
	Fluoride varnish for >6 mo at every visit [SO]			Office diagnostics
	Give dentist information			HPI or?
Order S	Standing lab orders for:			Orders module
	Hemoglobin >9 mos. and annually for >12 mos [SO] Or at every visit after 12] []	CG, Office diagnostics
	months??		J	CG
	Lead at 1 and 2 yo [SO]] 1	CG CG
	HIV for >12 yo [SO]] I	CG
	STD screening for >15 yo [SO]	L	1	
Have p	aperwork ready and filled out for WIC/school			
Patient	handouts:			
	Reach Out and Read program for 6 wk – 5 yo			
	NexGen's patient education material for appropriate age			
	Other:			

✓ Task ICD-10 Where/how to Initial Prenatal Visit	document
Check if CHW initial assessment is complete	
Collect urine for CT/GC and utox	
Ensure OB panel done	
Ask if pap smear has been done in last three years	
If no and patient is >21 years, offer exam today	
If yes but not done at LifeLong, complete Release of Information	
Ask if flu shot was done this year	
□ If no, offer	
 If yes, document date Inform provider if flu shot declined 	
Set up: Doppler for	
Ultrasound for Undress if:	
Paperwork:	
 Second trimester screening form 	
□ 1 st AFP form 10-13+6 weeks	
Document F number:	
Dental referral	
Schedule appointment for second trimester CHW visit	
Patient handouts:	
Routine Prenatal Visit	
Set up:	
 Doppler for 	
Ultrasound for	
Undress if:	
□at	
□at	
□at	
Ask:	
Fetal movement?	
Uterine contractions?	
Urine:	
Every visit after 29 weeks	
15-20 weeks:	
Check for 1 st AFP form and pull end AFP form	
2 nd AFP form at 15-20 weeks	
>20 weeks: Check 20-week ultrasound results	
□ Fax chart to hospital 24-28 weeks:	
□ GDM labs (CBC, A1C)	

	RH negative labs
	Genetic counselor or amniocentesis for positive screening
26-28	weeks:
	3 rd trimester appointment with CHW
	Hospital registration
35-36	weeks:
	TDap at 3 rd trimester
	Undress for GBS
	Order CBC, HIV, RPR
36 we	eeks:
	Start SDI paperwork
Gesta	tional diabetes:
	Blood sugar logs
	Check random blood sugar
	WHO to CCA
	Patient handouts:
Post-p	partum (2 and 6 weeks):
	Obtain hospital records
	Edinburgh postpartum depression screening
	Give BCM consent
	Patient handouts:

/	Chronic Disease Patients			
'	Task	ICI	D-10	Where/how to documer
	Diabetes			
	Random blood sugar [SO]	[]	CG, Office diagnostics
	At every visit			
	Hemoglobin A1C [SO]	[]	CG, Office diagnostics
	Every 3 months if A1C above%			
	Every 6 months if A1C below%			
	Order Standing order for annual labs:			Orders module
	Microalbumin/creatinine ration (urine) [SO]	[]	CG
	□ GFR or Cr (blood) [SO]	[]	CG
	Lipids (unless on statin) [SO]	[]	CG
	Immunizations [SO]	[1	CG
	□ Flu	-	-	IZ template
	PPSV 13 if PPSV 23 given at <65 yo >1yr ago			
	PPSV 23 for all DM patients (19-64 yo)			
	Hep B (3 shot series if not immune)			
	Eye care [SO]	[1	CG
	 Ask or look for last retinopathy screening 	Ľ	1	
	Refer to Ophthalmology for retinopathy screening if >1 year			Referral template
	Foot care [SO]	[1	CG
	 Perform monofilament if >1 year 	Ľ	1	DM foot screen temp
	 If positive: make podiatry appointment or make podiatry referral 			Referral template
_	Dental care [SO]			CG
	□ Ask: last dental appointment			
	 If not in last 6 months, provide dental contact info 			HPI or
	Behavioral health:			
	□ If >9% then			
	CCA WHO:			
	\Box For A1C >%			
	For Patient handouts:			
	Hypertension			
	If BP >140/90, recheck after 5 minutes:			
	Check BP from last visit			
	 Emptying bladder, relaxed patient, feet flat on floor 			
	Order/Perform Standing order labs and diagnostics:			CG
	□ EKG [SO]	[]	Orders Module
		[]	
	Creatinine and Potassium (blood) [SO]	-		
	 Creatinine and Potassium (blood) [SO] Microalbumin/creatinine ration (urine) [SO] 	[]	
		[]]	
	Microalbumin/creatinine ration (urine) [SO]] []]]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO]] []]]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] 	[[[]]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO] Make appointment in 2 weeks with PCP, nurse, or BP clinic 	[]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO] Make appointment in 2 weeks with PCP, nurse, or BP clinic Patient handouts: ER or Hospital Follow-up	[]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO] Make appointment in 2 weeks with PCP, nurse, or BP clinic Patient handouts: ER or Hospital Follow-up Obtain Medical Records]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO] Make appointment in 2 weeks with PCP, nurse, or BP clinic Patient handouts: ER or Hospital Follow-up Obtain Medical Records Assist/Anticipate:]]	
	 Microalbumin/creatinine ration (urine) [SO] Lipids (unless on statin) [SO] DM screening annually [SO] Make appointment in 2 weeks with PCP, nurse, or BP clinic Patient handouts: ER or Hospital Follow-up Obtain Medical Records]]	Med Inventory temp

- Office diagnostics for chronic diseases			
- Other:			
Pre-Operation			
Ask patient or provider for any forms that their surgeon needs PCP to sign for surgical			
clearance			
If over 50 years old, do EKG (if not done in last 3 months) [SO]	[]	EKG
Pain Management			
Make sure Pain Management Agreement is on file			
 If not new agreement and opioid/benzo risk consent ready for signing 			
Collection urine for utox]]	Orders module
Send every visit or if:			
CURES at every visit: Check with provider at huddle			
Depression			
Rescreen for PHQ every visit			PHQ temp

		Primary Care Procedures	
✓	Task		Where/how to document
	Consen	t form	
	Undres	s patient as needed	
	Set up s	supplies:	
	**Revie	ew reference guide	
		Cryotherapy	
		Punch/shave biopsy	
		Joint knee/shoulder injections	
		I&D	
		Suture	
		Suture removal	
		Splinting	
		Toe nail removal	
		Special needs:	

	Ob/Gyn Procedures					
✓	Task	Where/how to document				
	Consent form					
	UPT					
	Undress patient as needed					
	Set up supplies:					
	**Review reference guide					
	 IUD (insertion and removal) 					
	 Nexplanon (insertion and removal) 					
	Endometrial biopsy					
	 Cervical polyp removal 					
	Special needs:					

		Common Chief Complaints			
1	Task		IC	D-10	Where/how to document
-		cipated diagnostics that the dyad has agreed to complete at designated chief co			
	Fatigue:				
		Complete PHQ			PHQ template
		HGB [SO]	[]	Office diagnostics
		Female: UPT [SO]			Office diagnostics
	Dizzines	 55:			
		Orthostatics [SO]			
		HGB [SO]	[]	Office diagnostics
		Female: UPT [SO]	[]	Office diagnostics
	Headac				
		Snellen [SO]			Office diagnostics
	Ear/hea	ring issues:			
		Hearing exam [SO]	[]	Office diagnostics
	Eye/visi	on issues:			
		Snellen [SO]	[]	Office diagnostics
	Sore thr	roat:			
		Temperature			
		Rapid strep [SO]	[]	Office diagnostics
	Chest pa		_	_	
		EKG for >35 yo [SO]	[]	EKG
	Cough		_	_	
		O2 saturation	[]	VS template
		Peak flow			Office diagnostics
		nal pain:	_	_	
		Urinalysis [SO]	[]	Office diagnostics
		Female: UPT [SO]			Office diagnostics
		with urination/incontinence:		_	
		Urinalysis (leave for possible c/s) [SO]	[]	Office diagnostics
	Rash:				
		Undress to expose area			
	Boil/abs				
		Undress to exposure area			
		Anticipate I&D if	<u> </u>		
	Anal ble				
		Undress from waist down			
		Hematocrit card			
		Anoscope and lube			

	Women's Health			
Breast	pain:			
	Undress from waist up			
Irregula	r period/no period:			
	UPT [SO]	[]	Office diagnostics
	If positive:			
	issues:			
	Undress from waist down			
	Urinalysis [SO]	[]	Office diagnostics
	Set up wet mount tray			
	See procedure reference			
Positive	e UPT:			
	Have Pregnancy Verification Form and prenatal package or			
	TAB (therapeutic abortion) info ready			
Birth co	ontrol visit/contraception counseling:			
	Last menses			HPI or
	Last unprotected sex			
	Patient handouts:			
Depo:		+		
	Start:	[]	
	UPT if initiation or first follow-up injection [SO]		-	Office diagnostics
	Date of last Depo	1		HPI or
	Make next appt in 12 weeks	1		
П	Maintenance:	1		
		1		l

