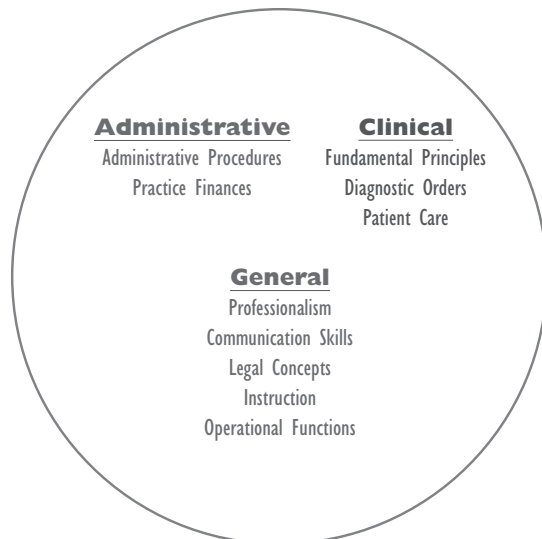


AAMA Role Delineation Study

Occupational Analysis of the Medical Assisting Profession



Update on the medical assisting profession

The health care delivery system is dynamic and changing. Medical assistants, who work in ambulatory health care settings and assist physicians in meeting the clinical and administrative demands of the medical office, must adapt with these changes. For this reason, the American Association of Medical Assistants (AAMA) publishes updates to its *Role Delineation Study* to provide a current analysis of the profession.

Last published in 1996, the update to the Role Delineation Chart is based on a survey conducted by an outside research firm. In April 2002, the survey was sent to a random sampling of 15,268 current CMAs, including AAMA members, nonmembers and former members. A total of 4,004 responses were received. This extraordinary response rate (26%) allowed for a 99% confidence level, with a reliability factor of plus or minus 1.7%.

The survey included a real-world component of what medical assistants are actually performing in the workplace and a forward-looking component of what the respondents thought medical assistants might be doing during the next five years. The survey results

indicated an increasing percentage of respondents (as compared to past surveys) are spending a greater portion of their time performing clinical tasks. Respondents also listed the tasks they think medical assistants will be delegated more frequently during the next five years. The top tasks included assisting in clinical or patient care procedures, patient education, management and supervisory tasks, coding and billing, intravenous procedures, and medical records.

The chart illustrates the areas of competence required for an entry-level medical assistant. Potential uses of the chart include the following:

- Description of the field of medical assisting for other health care professionals
- Identification of the entry-level areas of competence for medical assistants
- Framework for the development of continuing education programs
- Framework for self-assessment by practitioners

Acknowledgments

The AAMA Board of Trustees formed an ad hoc committee to analyze the results of the survey. The committee consisted of the chair, two CMA practitioners, one CMA educator, and the chairs of the Certifying Board, Curriculum Review Board, Continuing Education Board and Physician Liaison Board. The AAMA president, vice president and executive director served ex officio.

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Medical Assistant Role Delineation Chart

Administrative

- ADMINISTRATIVE PROCEDURES**
- Perform basic administrative medical assisting functions
 - Schedule, coordinate and monitor appointments
 - Schedule inpatient/outpatient admissions and procedures
 - Understand and apply third-party guidelines
 - Obtain reimbursement through accurate claims submission
 - Monitor third-party reimbursement
 - Understand and adhere to managed care policies and procedures
 - * *Negotiate managed care contracts*
- PRACTICE FINANCES**
- Perform procedural and diagnostic coding
 - Apply bookkeeping principles
 - Manage accounts receivable
 - * *Manage accounts payable*
 - * *Process payroll*
 - * *Document and maintain accounting and banking records*
 - * *Develop and maintain fee schedules*
 - * *Manage renewals of business and professional insurance policies*
 - * *Manage personnel benefits and maintain records*
 - * *Perform marketing, financial, and strategic planning*

Clinical

- FUNDAMENTAL PRINCIPLES**
- Apply principles of aseptic technique and infection control
 - Comply with quality assurance practices
 - Screen and follow up patient test results
- DIAGNOSTIC ORDERS**
- Collect and process specimens
 - Perform diagnostic tests
- PATIENT CARE**
- Adhere to established patient screening procedures
 - Obtain patient history and vital signs
 - Prepare and maintain examination and treatment areas
 - Prepare patient for examinations, procedures and treatments
 - Assist with examinations, procedures and treatments
 - Prepare and administer medications and immunizations
 - Maintain medication and immunization records
 - Recognize and respond to emergencies
 - Coordinate patient care information with other health care providers
 - Initiate IV and administer IV medications with appropriate training and as permitted by state law

General

- PROFESSIONALISM**
- Display a professional manner and image
 - Demonstrate initiative and responsibility
 - Work as a member of the health care team
 - Prioritize and perform multiple tasks
 - Adapt to change
 - Promote the CMA credential
 - Enhance skills through continuing education
 - Treat all patients with compassion and empathy
 - Promote the practice through positive public relations
- COMMUNICATION SKILLS**
- Recognize and respect cultural diversity
 - Adapt communications to individual's ability to understand
 - Use professional telephone technique
 - Recognize and respond effectively to verbal, nonverbal, and written communications
 - Use medical terminology appropriately
 - Utilize electronic technology to receive, organize, prioritize and transmit information
 - Serve as liaison
- LEGAL CONCEPTS**
- Perform within legal and ethical boundaries
 - Prepare and maintain medical records
 - Document accurately
 - Follow employer's established policies dealing with the health care contract
 - Implement and maintain federal and state health care legislation and regulations
 - Comply with established risk management and safety procedures
 - Recognize professional credentialing criteria
 - * *Develop and maintain personnel, policy and procedure manuals*
- INSTRUCTION**
- Instruct individuals according to their needs
 - Explain office policies and procedures
 - Teach methods of health promotion and disease prevention
 - Locate community resources and disseminate information
 - * *Develop educational materials*
 - * *Conduct continuing education activities*
- OPERATIONAL FUNCTIONS**
- Perform inventory of supplies and equipment
 - Perform routine maintenance of administrative and clinical equipment
 - Apply computer techniques to support office operations
 - * *Perform personnel management functions*
 - * *Negotiate leases and prices for equipment and supply contracts*

* Denotes advanced skills.