

AAMA 2007-2008

# Occupational Analysis of the CMA (AAMA)



In furtherance of its leadership role in the profession, the American Association of Medical Assistants (AAMA) has completed the following 2007–2008 *Occupational Analysis of the CMA (AAMA)*. In previous years, this document was titled *AAMA Role Delineation Study: Occupational Analysis of the Medical Assisting Profession*.

## A Necessary Distinction

A professional's skills are largely determined by professional education. The CMA (AAMA) is the only credential that requires candidates to be graduates of a programmatically accredited medical assisting program. Therefore, it is appropriate and necessary that the qualifying language “of the CMA (AAMA)” be incorporated into this document's title.

## About the Survey

A survey was sent to a random sample of CMAs (AAMA)—AAMA members and nonmembers. The CMA (AAMA) represents a medical assistant who has been credentialed by the Certifying Board of the AAMA. Of the 15,500 surveys distributed, 3,658 were collected and analyzed, resulting in a 95 percent confidence level. The results obtained from the sample are within  $\pm 1.6$  percent of the results if all 15,500 individuals had responded.

## Analysis Highlights

Today's CMA (AAMA) is expected not only to master the body of knowledge of the profession, but also to apply this

knowledge in the complex and fast-paced world of ambulatory health care. Thus, critical thinking is emphasized in this *Occupational Analysis*.

Another dimension in the *Occupational Analysis* reflects the growing awareness that the CMA (AAMA) is uniquely qualified to “speak the patient's language” and serve as a “communication liaison” between the busy physician and patients. The roles of the CMA (AAMA) as “patient advocate” and “health coach,” as well as “communication liaison,” are given appropriate prominence in this document.

All health professionals have been expected to refine their knowledge and skills in responding to natural and man-made emergencies, and the vital roles of CMAs (AAMA) have come into increasing focus in recent years. In keeping with this priority, the *Occupational Analysis* includes emergency-related functions under Communication, Instruction, and Patient Care.

## Uses of the Study

This document provides valuable data to the Certifying Board (CB) and the Continuing Education Board (CEB) of the AAMA, as well as to the Medical Assisting Education Review Board (MAERB). However, the *Occupational Analysis* should not be confused with the following documents:

- *Content Outline of the CMA (AAMA) Certification/Recertification Examination*, published by the CB

- *Advanced Practice of Medical Assisting*, published by the CEB
- *Standards and Guidelines for Medical Assisting Educational Programs*, published by CAAHEP
- *Curriculum Content and Competencies*, published by the MAERB

### Legal Scope of Practice

This *Occupational Analysis* does not delineate the legal scope of medical assisting practice. Legally delegable responsibilities vary from state to state. Scope of practice questions should be directed to AAMA Executive Director and Legal Counsel Donald A. Balasa, JD, MBA, at [dbalasa@aama-ntl.org](mailto:dbalasa@aama-ntl.org).

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# General, Clinical, and Administrative Skills\* of the CMA (AAMA)

## General Skills

### ◆ **Communication**

- Recognize and respect cultural diversity
- Adapt communications to individual's understanding
- Employ professional telephone and interpersonal techniques
- Recognize and respond effectively to verbal, nonverbal, and written communications
- Utilize and apply medical terminology appropriately
- Receive, organize, prioritize, store, and maintain transmittable information utilizing electronic technology
- Serve as "communication liaison" between the physician and patient

- Serve as patient advocate professional and health coach in a team approach in health care
- Identify basics of office emergency preparedness

### ◆ **Legal Concepts**

- Perform within legal (including federal and state statutes, regulations, opinions, and rulings) and ethical boundaries
- Document patient communication and clinical treatments accurately and appropriately
- Maintain medical records
- Follow employer's established policies dealing with the health care contract
- Comply with established risk management and safety procedures

- Recognize professional credentialing criteria
- Identify and respond to issues of confidentiality

### ◆ **Instruction**

- Function as a health care advocate to meet individual's needs
- Educate individuals in office policies and procedures
- Educate the patient within the scope of practice and as directed by supervising physician in health maintenance, disease prevention, and compliance with patient's treatment plan
- Identify community resources for health maintenance and disease prevention to meet individual patient needs

- Maintain current list of community resources, including those for emergency preparedness and other patient care needs
- Collaborate with local community resources for emergency preparedness
- Educate patients in their responsibilities relating to third-party reimbursements

### ◆ **Operational Functions**

- Perform inventory of supplies and equipment
- Perform routine maintenance of administrative and clinical equipment
- Apply computer and other electronic equipment techniques to support office operations
- Perform methods of quality control

## Clinical Skills

### ◆ **Fundamental Principles**

- Identify the roles and responsibilities of the medical assistant in the clinical setting
- Identify the roles and responsibilities of other team members in the medical office
- Apply principles of aseptic technique and infection control
- Practice Standard Precautions, including handwashing and disposal of biohazardous materials
- Perform sterilization techniques
- Comply with quality assurance practices

- Perform electrocardiography and respiratory testing
- Perform phlebotomy, including venipuncture and capillary puncture
- Utilize knowledge of principles of radiology

### ◆ **Patient Care**

- Perform initial-response screening following protocols approved by supervising physician
- Obtain, evaluate, and record patient history employing critical thinking skills
- Obtain vital signs
- Prepare and maintain examination and treatment areas
- Prepare patient for examinations, procedures and treatments

### ◆ **Diagnostic Procedures**

- Collect and process specimens
- Perform CLIA-waived tests

- Assist with examinations, procedures, and treatments
- Maintain examination/treatment rooms, including inventory of supplies and equipment
- Prepare and administer oral and parenteral (excluding IV) medications and immunizations (*as directed by supervising physician and as permitted by state law*)
- Utilize knowledge of principles of IV therapy
- Maintain medication and immunization records
- Screen and follow up test results
- Recognize and respond to emergencies

## Administrative Skills

### ◆ **Administrative Procedures**

- Schedule, coordinate, and monitor appointments
- Schedule inpatient/outpatient admissions and procedures
- Apply third-party and managed care policies, procedures, and guidelines
- Establish, organize, and maintain patient medical record
- File medical records appropriately

### ◆ **Practice Finances**

- Perform procedural and diagnostic coding for reimbursement
- Perform billing and collection procedures
- Perform administrative functions, including book-keeping and financial procedures
- Prepare submittable ("clean") insurance forms