Job Description for
Lead Medical Assistant

Department: Clinic Management
Dept.#: Various
Last Reviewed: 05/08; 08/12
Last Updated: 08/14

Reports To
Director Clinic Management/Clinic Manager

Job Summary
The Lead Medical Assistant is required to perform all duties of the Medical Assistant and functions as the resource person to the non-licensed staff. Also, the lead acts as a liaison between management and staff. The Lead Medical assistant in the office setting is a specialty requiring a variety of skills, including but not limited to: Receptionist, registration duties, ICD9 coding, data collection for billing procedures, charge posting, maintains appointment schedules, schedules surgeries/procedures and obtains appropriate authorizations and referrals, provides appropriate patient instructions per physician orders. The Lead Medical Assistant assists in some practices with patient care providing first level counseling to staff. Keeps manager apprised of early personnel issues.

Duties
1. Demonstrates competency and professional responsibility in the medical assistant role
2. Complies with personnel policies
3. Takes action based on constructive performance evaluations- staff development
4. Maintains confidentiality when interacting with patients, families, personnel and the public
5. Personnel are competent in their job responsibility orientation, training, skills evaluation, annual competencies and the successful completion of an annual employee evaluation. The annual competencies are based upon those specific tasks that are infrequently utilized and/or have a high potential for less than positive patient outcome
6. A comprehensive annual employee performance evaluation includes but is not limited to:
   - Completes orientation/safety/skills checklist on hire
   - Completed annual competency checklist as appropriate
   - CPR every two years if patient care is provided
   - Safety Education Self-Study Module
   - Age appropriate test
7. Chart review for completeness. (80%)
8. Test to assess ICD-9 coding ability. (80%)
9. Test to assess CPT 4 coding ability. (80%)
10. Demonstrates a working knowledge of P&P manual

11. Attends 75% of scheduled staff meetings

12. Maintains positive public relations image with peers, patients and visitors by presenting a positive, helpful attitude

13. Obtains patient information and inputs into the computer
   - Patient name
   - Address
   - Telephone number
   - Social Security Number
   - Occupation
   - Chief Compliant
   - Insurance information
   - Patient signature

14. Utilizes ICD-9 code book and records codes according to diagnosis

15. Disassemble patient medical record after patient visit and inputs and post patients charges into computer

16. Assembles patient medical records prior to provider/nurse receiving the record

17. Gathers data relevant to the patient’s age group and individual needs

18. Administer or handle medications

19. Obtains and records:
   - Vital signs
   - Time in/date
   - Weight
   - Medication profile
   - Immunization record
   - Allergies
   - Chief compliant
   - Signature/initials where appropriate

20. Prepares patient prior to provider examination
   - Sets patient on exam table
   - Patient changes into gown as appropriate

21. Answers telephone calls, identifying self and clinic/practice with proper patient triage

22. Receives and documents telephone messages and gives to the appropriate person

23. Schedules appointments with accurate patient information
24. Types various documents accurately and as directed, i.e., 1st reports, TAR’s and correspondence
25. Utilizes photocopy and facsimile machine
26. Gets authorization from insurance companies for approved referrals
27. Confirms appointment schedule and follow-up of missed appointments
28. Assists in maintenance of a neat, orderly and accurate medical record billing system
29. Ensures that patient medical record is disassembled after patient discharge and filed away promptly
30. Maintains a neat, clean and functional work station
31. Uses principles of body mechanics in mobilizing objects
   - Demonstrates appropriate use of Incident Reports
26. Has working knowledge and location of policy and Procedure manuals:
   - Safety
   - Infection control
   - Administration
   - MSDS manual
   - Disaster
   - Clinic/Practice-specific to manual

**Job Limitations**

Lead Medical Assistants may **NOT** do the following:

1. Assess patient conditions
2. Work outside assigned skills

**Qualifications**

1. High school graduate or its equivalency
2. Medical Assistant Certification required
3. Experience in medical front office procedures preferred
4. Typing, filing accurately
5. Current BLS certification
6. Must have proven ability to maintain professional conduct and confidentiality in the care of patients
7. Must possess basic computer skills

**Lifting Requirements**

Heavy: frequent lifting, not more than 100 pounds (with help) and/or carrying objects weighing up to 50 pounds. There may be prolonged periods of standing, walking, reaching, sitting and/or stooping.