

# CMA Externship Skills Checklist

- \_\_\_ Student self-evaluation
- \_\_\_ Student tracking sheet
- \_\_\_ Clinical site final evaluation (overall impression throughout clinical)

www.Collin.edu/CE  
 CEHealthcare@collin.edu  
 972.985.3761



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CMA EXTERN: \_\_\_\_\_ Extern phone #: \_\_\_\_\_

Site Name: \_\_\_\_\_ Site Contact name & #: \_\_\_\_\_

Date of this evaluation: \_\_\_\_\_

**MAIN OBJECTIVE to be achieved by student:** Receive a checkmark in at least 27 of Essential Job Functions by either **observing** the skill being done; having an **educational discussion** of the skill or **performing the skill**. DO NOT LEAVE COLUMNS BLANK. Some skills may not be applicable to the site, however if there is a practitioner who can have an educational discussion with the student about that task, that can count as a “needs practice” checkmark. For skills that cannot be obtained by one of the three means, mark with “N/A”.

<b>SKILL: Communication</b> <small>Objective for this section is to receive a checkmark in all.</small>		Needs Practice	Skill Mastery	Preceptor / Comments
1.	Speaks and writes with clarity (is logical in thought process).			
2.	Questions other health care professionals to collect pertinent patient information.			
3.	Communicates appropriately with the level of understanding of one's audience.			
4.	Uses good listening skills in all aspects of the job.			
5.	Communicates externship educational needs / Seeks out information that supports learning objectives and acquisition of skills competencies.			
6.	Asks open ended questions to understand directions and carry out directives.			
7.	Aware of non-verbal communication and posture when communicating with people.			
<b>SKILL: Patient Interaction</b> <small>Objective for this section is to receive a checkmark in all.</small>		Needs Practice	Skill Mastery	Preceptor / Comments
1.	Greets patient and introduces self and gives first name to them.			
2.	Clearly explain your role to the patient and why you're there.			
3.	Interviews patient or caregiver using open ended questions to collect information.			
4.	Uses different strategies for communicating with non-English speakers or patients who are impaired i.e. deaf, cognitively impaired, etc.			

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<b>SKILL: Patient Interaction (cont'd)</b> <small>Objective for this section is to receive a checkmark in all.</small>		Needs Practice	Skill Mastery	Preceptor / Comments
5.	Exhibits an attitude of empathy and compassion while caring for patient.			
6.	Actively listens to the patient acknowledging and responding to and recording all concerns.			
7.	Honors patients with respect and attention.			
<b>SKILL: Personal Characteristics</b> <small>Objective for this section is to receive a checkmark in all.</small>		Needs Practice	Skill Mastery	Preceptor / Comments
1.	Arrives for shift on time.			
2.	Problem solves in the workplace to better a situation.			
3.	Adaptable to change, diligent and hard-working.			
4.	Agreeable to coaching and correction.			
5.	Takes initiative and anticipates need of co-workers and patients.			
6.	Demonstrates ethical behavior with emphasis on confidentiality, realization of professional liability, and knows the importance of following protocol. Has integrity.			
7.	Maintains emotional stability to withstand the stresses, uncertainties, and changing circumstances that characterize patient/client care responsibilities.			
8.	Accepts direction and guidance from a supervisor or faculty member.			
9.	Understands that each facility has some procedures that may differ from others and easily adapts to yours.			
10.	Maintains impeccable personal hygiene and grooming.			
11.	Additional Communication / Patient interaction skills / Personal Characteristics displayed:			
12.	Completes timesheet correctly, thoroughly, asks for supervisor signature in a timely manner.			

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	<b>SKILL: Essential Job Functions</b> <small>Objective is to receive a checkmark in at least 26 (1/2) or more, of Essential Job Functions</small>	<b>Needs Practice</b>	<b>Skill Mastery</b>	<b>Preceptor / Comments</b>
1.	Documents appropriately and accurately on all patient medical records and other office paperwork that concerns the patient (can be hard copy or EMR).			
2.	Manages appointments using established priorities.			
3.	Executes data management using electronic healthcare records.			
4.	Applies HIPAA rules in regards to privacy/release of information.			
5.	Recognizes procedural coding forms: ICD-9 & 10 CPT, HCPCS.			
6.	Performs, discuss or observes verification of eligibility and benefits.			
7.	Performs, discuss or observes preauthorization and/or referral procedures.			
8.	Performs, discuss or observes billing and collection procedures.			
9.	Performs, discuss or observes medical aseptic hand washing.			
10.	Uses standard precautions while donning and removing PPI (physician preference items).			
11.	Uses standard precautions for sanitizing instruments and discarding biohazardous material.			
12.	Obtains and record a patient history.			
13.	Obtains vital signs: blood pressure.			
14.	Obtains vital signs: temperature.			
15.	Obtains vital signs: pulse.			
16.	Obtains vital signs: respiration.			
17.	Obtains vital signs: height and weight.			

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18.	Performs, discuss or observes visual acuity test using Snellen chart.			
19.	Prepares the patients for and assist with routine and specialty examinations.			
20.	Maintains medication and immunization records.			
21.	Prepares a prescription for the physician's signature.			
22.	Administers oxygen by nasal cannula or mask.			
23.	Instructs patient in use of metered dose inhaler.			
24.	Administers nebulizer treatment(s).			
25.	Prepares proper dosages of medication for administration.			
26.	Administers oral medications.			
27.	Administers intradermal injections.			
28.	Administers subcutaneous injection.			
29.	Administers intramuscular injection.			
30.	Performs, discuss or observes first aid procedures: control bleeding.			
31.	Performs, discuss or observes first aid procedures: care for a patient who has fainted.			
32.	Collects a specimen for throat culture.			
33.	Irrigates a patient's ear.			
34.	Collects a wound specimen for testing and/or culture.			
35.	Assist with the examination of a female patient and obtain a pap smear.			
36.	Instructs patient in breast self-examination.			

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37.	Instructs patient in testicular self-examination.			
38.	Performs, discuss or observes electrocardiography.			
39.	Performs, discuss or observes a urinalysis.			
40.	Performs, discuss or observes venipuncture: syringe method and uses standard precautions and proper sharps disposal techniques.			
41.	Performs, discuss or observes venipuncture: evacuated tube method and uses standard precautions and proper sharps disposal techniques.			
42.	Performs, discuss or observes venipuncture: winged infusion set and uses standard precautions and proper sharps disposal techniques.			
43.	Performs, discuss or observes venipuncture: fingertip puncture and uses standard precautions and proper sharps disposal techniques.			
44.	Operates centrifuge.			
45.	Performs, discuss or observes a surgical hand scrub.			
46.	Performs, discuss or observes with minor surgery.			
47.	Performs, discuss or observes with suturing, suture removal and staple removal.			
48.	Setting up and covering a sterile field.			
49.	Transfer a patient from wheelchair to examination table. Transfer a patient from examination table to wheelchair or walker.			
50.	Teach the patient to ambulate with axillary crutches, cane, and/or walker.			
51.	Apply elastic bandaging.			
52.	Apply an arm sling.			

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53.	Additional skills added during this externship: a. b. c. d.			

## PRECEPTOR FINAL REVIEW OF COMPETENCIES

Date of final review: \_\_\_\_\_

Students need to have an understanding of where they need to improve and what they are good at doing. Please have a professional conversation with the student to go over each of these competencies. Help them understand where they can improve.

- Every competency has been checked off with either a "Needs Practice" or "Skill mastery" by the preceptor
- Skills that were unattainable by: Observing / Having an educational discussion of / or Performing have been marked as an "NA"
- A face to face conversation of this final evaluation has been conducted with the student
- In your opinion, student passed competencies / did not pass competencies (circle one)

Final review comments:

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Final evaluator / Preceptor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Student signature: \_\_\_\_\_

Date: \_\_\_\_\_