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Premier MD  
Dermatology Center of NJ



Richard L. Corson MD LLC  
“Family Medicine the way it should be”



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## EMPLOYABILITY SKILLS: HIGH-PERFORMING PHLEBOTOMIST/PATIENT SERVICE TECHNICIAN

SPONSORED BY RARITAN VALLEY COMMUNITY COLLEGE • June 4, 2014

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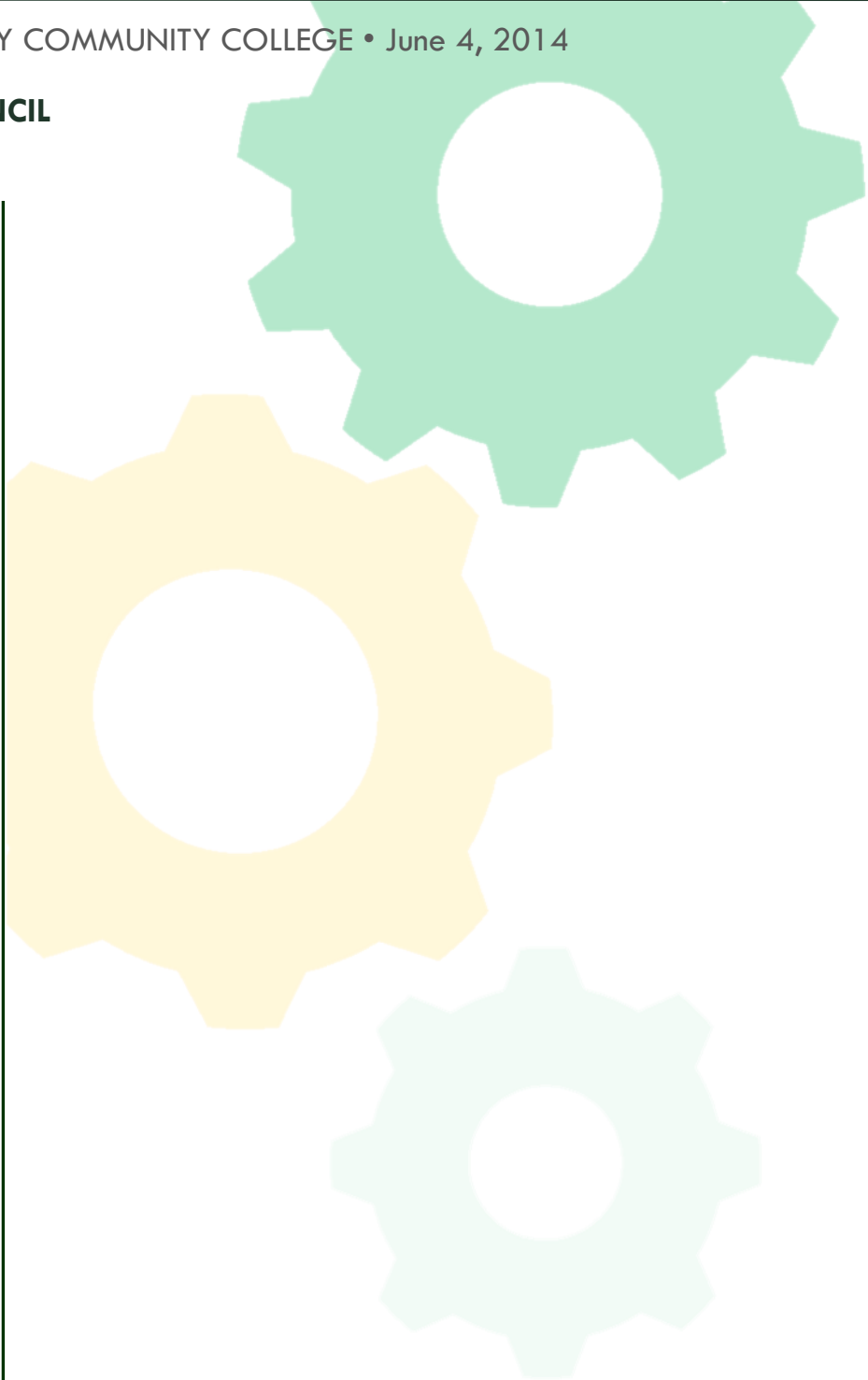
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Prepared for RVCC's Phlebotomy Program



# Employability Skills for Phlebotomist/PST (Patient Service Technician)

## High Performing - Entry Level

### Duties

<b>A</b> <b>Make Good Decisions</b>	A1 Ask for help when needed <div><div>6</div><div>2</div><div>5</div><div>1</div><div>1</div></div>	A2 Recognize need for more information <div><div>1</div></div>	A3 Give correct instruction to patient <div><div>2</div><div>2</div></div>	A4 Decide when to make exceptions to lab policy	A5 Correctly use authority without exceeding limit	A6 Adjust own work schedule to meet customer need <div><div>2</div><div>1</div><div>2</div></div>
<b>B</b> <b>Demonstrate Personal Integrity</b>	B1 Respond appropriately to situations of right and wrong <div><div>2</div><div>1</div><div>3</div><div>2</div></div>	B2 Address those who push ethical limits	B3 Protect confidential information <div><div>3</div></div>	B4 Report wrongdoing to someone with higher authority <div><div>2</div></div>	B5	B6
<b>C</b> <b>Take Professional Responsibility</b>	C1 Comply with company policy <div><div>3</div><div>4</div><div>1</div></div>	C2 Protect company assets <div><div>1</div></div>	C3 Report to work as scheduled <div><div>4</div><div>2</div><div>2</div></div>	C4 Ability to adapt to change	C5 Ability to adapt to change	C6 Ability to adapt to change
<b>D</b> <b>Pursue Professional Development/Improvement</b>	D1 Prioritize job tasks <div><div>1</div><div>2</div><div>1</div></div>	D2 Adapt to internal/external customer needs <div><div>2</div></div>	D3 Ability to adapt to change <div><div>8</div><div>3</div><div>5</div></div>	D4	D5	D6
<b>E</b> <b>Use Proper Social Skills at Work</b>	E1 Demonstrate time management skills <div><div>1</div></div>	E2 Respect other people's time <div><div>1</div></div>	E3 Meet work schedules (e.g., on time arriving, returning from breaks, lunch) <div><div>4</div><div>2</div><div>3</div></div>	E4 Demonstrate ability to plan ahead <div><div>1</div><div>2</div><div>2</div></div>	E5	E6
<b>F</b> <b>Relates Well to Internal/External Customers</b>	F1 Follow through with tasks <div><div>1</div><div>6</div><div>5</div><div>4</div></div>	F2 Take accountability for choices	F3 Commit to help others (patient first, office worker second) <div><div>3</div></div>	F4 Take accountability for behavior <div><div>6</div></div>	F5	F6
<b>G</b> <b>Demonstrate Workplace Safety</b>	G1 Complete secondary education <div><div>2</div></div>	G2 Demonstrate strong written communication skills	G3 Demonstrate strong reading communication skills <div><div>1</div></div>	G4 Perform basic computer technology skills <div><div>1</div><div>2</div></div>	G5 Demonstrate strong oral communication skills <div><div>5</div><div>1</div></div>	G6 Perform basic math skill (e.g., addition, subtraction, multiplication, division, make change-money)
<b>H</b> <b>Commit to Quality</b>	H1 Prioritize patient care <div><div>4</div><div>1</div><div>1</div></div>	H2 Perform all aspects of front office operations <div><div>1</div><div>1</div></div>	H3 Maintain patient records <div><div>1</div></div>	H4 Maintain standard (safety) precautions	H5 Perform patient clinical procedures <div><div>3</div></div>	H6 Provide patient education <div><div>1</div></div>
<b>I</b> <b>Demonstrates Time Management Skills</b>	I1 Respect personal space <div><div>2</div></div>	I2 Demonstrate willingness to compromise <div><div>1</div><div>8</div></div>	I3 Work well with others <div><div>5</div><div>1</div></div>	I4 Participate in team building	I5 Use appropriate body language <div><div>3</div></div>	I6 Respond well to feedback

5

1

1

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Tasks —————→

A7 Fix work related problems	A8 Be helpful to others <div><div>2</div><div>1</div><div>1</div></div>	A9 Recognize when they are a part of problem for others <div><div>1</div></div>	A10 Utilize available resources	A11	A12	A13
B7	B8	B9	B10	B11	B12	B13
C7 Ability to adapt to change	C8 Ability to adapt to change	C9 Ability to adapt to change	C10 Ability to adapt to change	C11 Ability to adapt to change	C12 Ability to adapt to change	C13 Ability to adapt to change
D7	D8	D9	D10	D11	D12	D13
E7	E8	E9	E10	E11	E12	E13
F7	F8	F9	F10	F11	F12	F13
G7 Demonstrate ability to follow directions/ instructions (e.g., written, verbal) <div><div>1</div><div>4</div></div>	G8	G9	G10	G11	G12	G13
H7 Perform back office clinical operations	H8 Perform CLIA-waved procedures	H9 Maintain professional responsibilities	H10 Assist provider with various clinical procedures <div><div>1</div><div>2</div></div>	H11 Administer patient medications	H12	H13
I7 Demonstrate cultural sensitivity <div><div>4</div></div>	I8 Avoid inappropriate behavior (i.e., sexual harassment) <div><div>1</div></div>	I9	I10	I11	I12	I13

#

.....Critical Duty

#

.....Most time spent on task

#

.....Training Most Needed by New Workers

#

.....Training Most Needed by Veteran Workers

Note: Numbers represent total votes from panel of 9. Not all votes were expended in all categories.

Employability Skills Profile: Entry-level High-Performing Medical Assistant

<div><div>Tools, Equipment &amp; Materials</div><div><div>Back Office</div><div>Ace bandages</div><div>Alcohol</div><div>Alcohol wipes</div><div>Alphabetical/Numerical sorter</div><div>Anal basins</div><div>Anal scope &amp; supplies</div><div>Antiseptic hand sanitizing solution</div><div>Audiometry equipment</div><div>Autoclave/tape/bags</div><div>Balance scale</div><div>Betadine</div><div>Bio hazardous/hazardous waste</div><div>Biotest</div><div>Blood glucose monitor/Test strips</div><div>Blood pressure cuff (prefer manual)</div><div>Breathalyzer</div><div>Butterfly needles</div><div>Casting materials</div><div>Cast removal machine</div><div>Catheters/urinary</div><div>Centrifuge</div><div>Chemical sterilant</div><div>Chemical/thermal packs</div><div>CIRCs</div><div>CLIA waived</div><div>Containers</div><div>Cotton tip applicators</div><div>Crash cart</div><div>Crutches</div><div>Cultures (bacterial/viral)</div><div>Dermabond</div><div>Diapers</div><div>Diluent solution</div><div>Diluent water</div><div>Doppler Monitor</div><div>Dosimeter</div><div>Drainage tube</div><div>Drapes/gowns/capes</div><div>Dressing supplies/wound packing supplies</div><div>Drugs &amp; solutions</div><div>EKG machine/supplies</div><div>Electro-cautery</div><div>Emergency lighting</div><div>Emesis basin</div><div>Examination table/chair</div><div>Fecal occult blood test supplies</div><div>Finger sticks (capillary punctures)</div><div>Fleet enemas</div><div>Foot cradle</div><div>Formalin</div><div>Gauze/tube/pads/sterile</div><div>Germicide solution</div><div>Gloves/sterile/utility</div><div>Glucose monitors</div><div>Gramstain supplies</div><div>Gurney</div><div>H and H</div><div>Head/hand mirror</div><div>Hot packs</div></div></div>	<div><div>Hydrogen peroxide</div><div>Ice packs</div><div>Irrigation tray</div><div>Ishiara chart</div><div>Kidney basin</div><div>Lab slides/cover slips</div><div>Labels</div><div>Lancet</div><div>Masks/caps</div><div>Medication cups</div><div>Micro chutes</div><div>Microcapillary hematocrit tubes</div><div>Microscope</div><div>MSDS</div><div>Normal saline</div><div>Ophthalmoscope</div><div>Otoscope/otoscope sheaths</div><div>Oxygen/tank/masks</div><div>Pap smear fixative</div><div>Pap smear kit</div><div>Paper sheeting for exam table</div><div>Phenol solution</div><div>Pipette</div><div>Podophyllin solution</div><div>Polices &amp; procedures manual</div><div>Potassium hydroxide</div><div>Prescription pads</div><div>Protective wear (gowns/masks/face shields/goggles)</div><div>Pulmonary nebulizer</div><div>Pulse oximeter</div><div>Punch biopsy kit</div><div>Razors</div><div>Reference books</div><div>Scale adult &amp; baby</div><div>Sharps container</div><div>Silvadene</div><div>Slings</div><div>Snellen chart/ eye chart</div><div>Speculums</div><div>Spirometer</div><div>Splints/braces</div><div>Sterile water</div><div>Sterile wrap (autoclave)</div><div>Steristrips</div><div>Stethoscope (prefer manual)</div><div>Suction equipment/instruments</div><div>Surgical tape</div><div>Suture removal equipment</div><div>Sutures</div><div>SVN</div><div>Swabs (throat)</div><div>Syringes/needles</div><div>Telephone message pads</div><div>Thermometer (oral/rectal/aural)</div><div>Thermometer sheaths</div><div>Tincture of Benzoin</div><div>Tongue depressors</div><div>Tourniquets</div><div>Trach tubes</div><div>Tubex syringe holders</div></div>	<div><div>U.A. supplies</div><div>Urine dipstick</div><div>Vacutainer (needles/tubes)</div><div>Walkers</div><div>Waterpik/ear syringe</div><div>Wheel chair</div><div>Business &amp; Front Office</div><div>Alphabetical/Numerical sorter</div><div>Answering service</div><div>Appointment book</div><div>Appointment cards</div><div>Computer</div><div>Credit card machine</div><div>Daysheets (if office not computerized)</div><div>Dictaphone</div><div>Disinfectant</div><div>Emergency lighting</div><div>Fax</div><div>Forms (HCFA billing/health history/new patient/HIPAA)</div><div>General ledger (if office not computerized)</div><div>Internet Access</div><div>MSDS</div><div>Photocopier</div><div>Policies and procedure manual</div><div>Postal machine and meter</div><div>Printers</div><div>Reference books</div><div><div><div>Gray's Anatomy</div><div>ICD-9-CM (9<sup>th</sup> edition, Clinical Modification)</div><div>CPT</div><div>HCFA</div><div>PDR</div><div>Medical Dictionary</div></div></div><div>Software (Used for billing, AP/AR, word processing, must be able to use properly and troubleshoot). Office applications: Windows, Word, Excel. Many different EMRs used, including:</div><div><div><div>NextGen</div><div>Medisoft</div><div>Soapware</div><div>Centricity</div><div>EPIC</div><div>Intergy</div><div>Amazing charts</div><div>E-clinical works</div><div>Velocidoe (sp?)</div><div>Practice fusion (free EMR)</div></div></div><div>Telephone</div><div>Telephone message pads</div></div>
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Future Trends & Concerns
<b>Changes in Field:</b>
The panelists sited the following changes that are impacting phlebotomists: <ul style="list-style-type: none"><li>◊ Increased automation - scanners now check patient information - "positive patient ID- never leave patient while performing procedure"- "no ID band- no blood work"</li><li>◊ Increased customer service expectation</li><li>◊ Increased career opportunities</li><li>◊ Increase regulations</li><li>◊ Increased responsibility - (not just drawing blood anymore)</li><li>◊ Increase in workload</li><li>◊ Tests have become more advanced, and more numerous</li><li>◊ New equipment</li></ul>
<b>Job Role and Perception:</b> <p>The panelists expressed concern for the general perception of the role Phlebotomist, and commitment to the field. Phlebotomists are specialists at their craft and the “face of the laboratory”, and employers would like to see more folks treat the profession as a career and not just a job. While some hospitals are expecting PCT’s to draw blood, there is a concern for this trend because phlebotomy is not their specialty. Phlebotomists are on the front lines, and are on the “bottom of the totem pole” with regard to RN’s, doctors and Laboratorians. So while they are the most important people in the lab (according to their supervisors), their profession is often under appreciated.</p>
<b>Staffing Concerns:</b> <p>Employers are experiencing a lack of quality in the candidate pool for phlebotomists. As one panelist said, "Phlebotomists are a dime a dozen, finding the right one is key". It is difficult for them to find reliable people, which is compounded by the fact that they are dealing with an issue of understaffing. Cost containment is affecting staffing levels and "upper management fails to believe that bad draws cost more". The trend is now for companies to hire per diem, and transition to full time from within. However, supervisors expressed concern that per diem employees do not take the job as seriously as full time employees, and they call out twice as much as full timers. Finding quality and reliability is key.</p>
<b>Age and the Vet Tech:</b> <p>While there is a wide range of age for veterinary technicians, due to the physical nature of the position, aging veterinary technicians may face challenges with the physical demands of the job. Panelists expressed concern that salary may not support retirement. There is also concern that you can age out if you do not stay current and grow with the industry.</p>
<b>Women Dominate the Field:</b> <p>The veterinary field is being taken over by women with 80% of the workers being female. This is an important aspect to consider because family planning tends to more greatly impact women. Because men are minorities they have a hiring advantage, “I see a male name and I think muscle.”</p>

Cont. from previous page

General Knowledge & Skills

Math Skills

- Need to be able to calculate dosages
- Ability to work with and apply simple formulas (unit conversion)
- Can use calculator

Writing/Grammar/Spelling Skills

- Medication Spelling (Reference)
- Grammar important
- Complete fill-in forms
- Patient information written (6-10th grade level)
- Point of sentence must be clear
- Spelling must be accurate
- Write legibly
- Write simple letters
- Writing – clear & concise for doctor
- Writing --simple sentences (no clauses)

Reading

- To understand policies and procedures
- To understand updates
- 10th grade level
- Literate enough to chart

Locating Information

- Plotting information (i.e. interpreting charts, graphs & tabulate data)
- Navigate EMR

Time Management Skills

- Awareness of own schedule & others schedules and ability to work within time constraints

Organizational Skills

Communication Skills

- Medical terms to laymen’s terms
- With patients and their families, with doctors
- Must be able to communicate (disability assistance acceptable)

Basic Computer skills

- Software applications (see knowledge),
  - ◊ Email - for internal communications; Outlook, Groupwise - manage attachments and make folders
  - ◊ MS Word - templates, fill-in or print
- Ability to learn to use a software program
- Internet - search, navigate a webpage (most already know how)
- Need to be able to fill out database forms
- Manage passwords appropriately

Basic Office Equipment - scanner, copier, fax

Medical Assisting Knowledge & Skills

Anatomy and Physiology  
Available healthcare resources  
Clinical procedures  
CPR  
CPT  
Documenting medical records  
Electronic medical billing  
Emergency protocols  
EMR (Electronic Medical Records)  
Fundamentals of billing  
Gender/cultural diversity  
HCPCS  
HIPPA  
How insurance works \*(very important!)  
ICD-x edition, Clinical Modification (diagnosis codes)  
Insurance  
Insurance terminology  
JCAHO (hospital & some offices)  
Knowledge of equipment/use  
Legal issues/aspects of healthcare  
Maintain equipment (including calibration) Medical terminology  
Office operations  
OSHA regulations  
PDR  
Pharmacology – common medications: allergy vs. side-effect  
Phlebotomy (cert or no cert ok)  
Problem solving  
Scope of practice/state regulations  
Difference between what a CMA vs non-CMA can do in an office vs. hospital  
Standard procedures of infection control  
Sterile technique  
Telephone etiquette  
Triage/scheduling  
Understand how physician schedules work  
Vitals

Worker Behaviors

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Adhere to administrative HIPAA Policy</li><li>• Maintain patient privacy</li><li>• Practice OSHA standards</li><li>• Communicate in layman’s terms</li><li>• Maintain ethical standards (behave ethically)</li><li>• Provide quality customer service</li><li>• Team-player</li><li>• Focus on work</li><li>• Organized</li><li>• Empathetic</li><li>• Compassionate</li><li>• Takes initiative</li><li>• Multi-tasker</li><li>• Honest</li><li>• Dependable</li></ul> | <ul style="list-style-type: none"><li>• Responsible</li><li>• Patient (having patience)</li><li>• Professional/mature</li><li>• Anticipate needs</li><li>• Detail-oriented (attention to detail)</li><li>• Personal drama stops upon arrival</li><li>• Responsive</li><li>• Works smarter not harder</li><li>• Confident</li><li>• No texting or cell phone use</li></ul> |
|--|---|

**Emerging Trends**

- Certification (CMA or RMA)
- M.A. becoming assistant scribe abstractor to doctor to fill in check lists
- Increase in efficiency
- Pre-visit planning - PCMH certification
- Meaningful use - CMS - criteria met = funding from Medicare (only pertains to practices that accept Medicare/Medicaid)
- 6 sigma (greenbelt & black belt)
- Ability to use internet (more & more content/charts/films online)
- Shift in hiring trends
  - ◊ Every RN position vacated is being filled with two CMA positions
  - ◊ Some (ex. Hunterdon Medical) are focusing on cross-training

**Dying Trends**

- Paper charting
- Reimbursement
- Private practice - Joining hospital systems as partner/employee

**Attendance**

- Must adhere to daily work schedule
- 2 to 6 months probation
- 3-day no call/no show = voluntary resignation (3 strikes, 3 times, 3 shifts)
- Must be ready to work at start time.

**Reasons for Terminating Employees**

- Did not understand or speak clear English
- Under dressing
- Did not know how to answer the phone
- Insubordination
- Not following policy
- Inappropriate behavior with co-workers
- Late more than 3 times in a week
- Absence/punctuality
- Rude to patients
- Did not work well with others
- Handled patients roughly
- Unable to work with co-workers - too much drama/conflict

**Reasons for Retaining Under-performing Employees**

- Good attitude
- Good work ethic
- Good people skills
- Good communication skills
- Speed
- Knowledge
- Ability to "calm the waters" before they escalated with patients and staff
- Great talent in keeping things in perspective
- Had capability but became under-achieving due to length of stay. (Worked with them on an individual basis to bring back to policy of office)

**Hiring Requirements**

- Drug test
  - ◊ Pre-employment (for some)
  - ◊ Random (for some)
- Non-smoking offices (for some)
- Current TB test - pre-employment
- Current Hepatitis - pre-employment
- Current résumé
- Current CPR with AED - required after hire
- Some provide Hepatitis & TB upon hire
- Some only hire CMA
- Background check - credit and criminal (for some)
- Color blindness testing
- Spanish is a plus (if bilingual practice)
- Helpful if candidate has volunteered in a hospital and become accustomed to smells.

**Hiring Barriers**

- No GED/Diploma (this is an obstacle, but not a barrier for some)
- Felony (depends on the nature of the charge)
- Not a legal US resident
- Misdemeanor (depends on the nature of the charge)
- Language - communication is key (accents or other issues that would impede communicating)
- Not having reliable transportation
- Facial piercing

**Appearance**

- No facial piercings - must be removed due to safety issues
- No fake or long nails
- No visible tattoos
- Clean and pressed
- Appropriate undergarments (clothing cannot be see-through)
- No low-cut shirts
- Clinical scrubs required for some practices
- Natural make-up
- Professional appearance
- Clean, closed-toe shoes
- Long hair tied back
- Clean hair and nails
- Good personal hygiene
- NO SCENT - includes perfume/cologne, cigarette smoke and hygiene (applies to hospitals and some practices)

**Acronyms Used**

AED: Automated External Defibrillator  
ACLS: Advanced Cardiac Life Support  
CEU: Continuing Education Units  
CLIA: Clinical Lab Improvement Act/Amendment  
CMA: Certified Medical Assistant  
CMS: Center for Medical Service  
CPR: Cardio Pulmonary Resuscitation  
CPT: Current Procedural Terminology  
CV: Cardiovascular  
EKG: Electrocardiogram  
HCFA: Health Care Financing Administration  
HCG: Human Chronic Gonadotropin (pregnancy test)  
HCPCS: Healthcare Common Procedure Coding System  
HIPAA: Health Insurance Portability and Accountability Act  
HTN: Hypertension  
ICD: International Classification of Diseases  
JCAHO: Joint Commission on Accreditation of Healthcare Organizations  
MSDS: Material Safety Data Sheets  
NRCMA: Nationally Registered Certified Medical Assistant  
OSHA: Occupational Safety & Health Administration  
PALS: Pediatric Advanced Life Support  
PCMH: Patient Center Medical Homes (Certification)  
PDR: Physician's Drug Reference  
PFT: Pulmonary Function Test  
PT/INR: Prothrombin Time/International Normalized Ratio  
RMA: Registered Medical Assistant  
TB: Tuberculosis