AMBULATORY PATIENT CHECKLIST FOR MEDICAL ASSISTANTS

This checklist was designed to help medical assistants remember key steps in a patient’s visit. The steps are color-coded to show which influence efficiency (blue), which influence reimbursement (green), and which influence patient safety (red).

Check-in

☐ Pre-ordered and pre-protocol labs drawn/urine collected
☐ Evaluate for abnormalities
   ☐ Labs for physicals and all procedures
☐ Vital signs
   ☐ Height, weight, BP, HR, RR
   ☐ Temp on all sick visits
   ☐ Pulse ox for all respiratory, O2 users
   ☐ Visual acuity for all eye visits, DOT physicals, and children’s physicals
   ☐ Critical vitals relayed to provider
☐ Assess for IV, O2, EKG, nebs, ambulance, procedure room
☐ Main reason for visit is HPI item
☐ Acute/follow up – chief complaint
   ☐ Follow up plans from last visit are HPI items
   ☐ “Do you have any other items you want to discuss with (provider) today?”
☐ Physicals – health checkup HPI
   ☐ Medicare – all chronic illnesses listed
   ☐ Acute complaints
   ☐ Any other complaints
☐ Review of systems
☐ Patient paperwork asked for and filled out
☐ Allergies/medications filled out or confirmed
☐ No blanks in PMH, FH, SH (document tobacco)

□ Assess for additional studies (ABI, EKG, x-ray, etc.)
□ Flowsheets filled out
   ☐ Back pain
   ☐ CAD
   ☐ Hyperlipidemia
   ☐ Hypertension
   ☐ Preventive care
   ☐ Diabetes
   ☐ Vital signs
☐ Patient education sheets identified and linked
☐ Recheck blood pressure if elevated (>129/84)
☐ Patient assessed for gown
☐ Expectation management
☐ Doctor notified

Check-out

☐ Referrals and appointments made
☐ Prescriptions given and picked up at dispensary
☐ Recommendation sheet given to patient
☐ Patient asked if he/she understands the doctor’s orders
☐ Patient survey offered
☐ Signed up for patient portal
☐ Follow up scheduled

FPM Toolbox To find more practice resources, visit https://www.aafp.org/fpm/toolbox.
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