How Will This Toolkit Help Me?

Learning Objectives:

1. Identify steps to begin a medical assistant professional development program in your practice
2. Describe best practices for developing a professional development training curriculum and materials
3. Explain how to execute and evaluate a medical assistant professional development program
Introduction

Medical assistants (MAs) are at the front line of patient care and play an integral role in achieving practice goals such as increased patient satisfaction, improved quality of care, and enhanced team-based care. You can enable medical assistants to contribute in a more meaningful way to the practice team through professional development training.

While creating your own medical assistant professional development program will be invaluable to your practice, it does not take the place of a certified medical assistant training program accredited by organizations such as the Commission of Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES). Graduates of these programs are eligible to take the Certified Medical Assistant exam through the American Association of Medical Assistants (AAMA).

Examples of other organizations that provide certification credentials include:

- American Association of Medical Assistants—Certified Medical Assistant (CMA)
- National Center for Competency Testing—National Certified Medical Assistant (NCMA)
- National Healthcareer Association—Certified Clinical Medical Assistant (CCMA)
- National Healthcareer Association—Certified Medical Administrative Assistant (CMAA)
- American Medical Technologists—Registered Medical Assistant (RMA)

Four STEPS to Start a Medical Assistant Professional Development Program in Your Practice

1. **Poll the Team and Prioritize Training Topics**

2. **Select a Program Leader**

3. **Assemble the Curriculum and Educational Materials**

4. **Execute and Evaluate the Training**

Poll the Team and Prioritize Training Topics

Lifelong learning is a crucial aspect of developing a strong team and promoting the pursuit of knowledge and personal development as individual goals for your practice team members.

Gather your practice team, including any medical assistants you might currently have on staff, and ensure that you have their full support for a professional development series for your medical assistants. Brainstorm with your team to develop a comprehensive list of identified gaps in care, breakdowns in practice workflow, and other training or development opportunities. Prioritize the topics that are most important to your team and use them as the building blocks of your curriculum for your program's first year.

You can use the medical assistant education survey checklist below to help your team brainstorm ideas for your medical assistant professional development program.
Who on the team should use the survey checklist to identify training opportunities?

Ideally, everyone on the team as well as patients the medical assistants interact with can use the survey checklist. Combining individual practice team members' unique perspectives will help you develop a more comprehensive set of information to identify and prioritize medical assistant professional development topics.

Involving medical assistants, physicians, nurses, registration staff, and other members of the team in prioritizing training topics and areas of focus. You can consider asking patients to complete the survey, or use their feedback from satisfaction surveys as a way to include their input. Consider involving practice or system leadership as well.

How much of a time commitment is the training?

Commit to provide medical assistant professional development sessions monthly for at least one year. Each session should be 45 minutes to one hour. Before starting the program, prepare to spend time on content development and creating space in the schedule for the hour-long lunchtime or pre-clinic sessions. Training should be considered a practice investment, so medical assistants should be compensated for attendance.

How can providing education to medical assistants improve the experience of patients, physicians, and other team members in our practice?

Shifting some of the physicians' administrative and clinical tasks to well-trained medical assistants gives physicians more time to concentrate on the patient during visits. For example, if an MA has the training to use expanded rooming protocols when rooming a patient, he or she will complete the following tasks:

- Update patient, family, and social history
- Update screening information
- Complete medication reconciliation and identification of patient questions or concerns about medications
- Scan records from specialists or other facilities into the medical record
- Accurately measure and record vital signs
- Place orders according to established standing order protocol

All medical assistant services must be provided within the applicable scope-of-practice parameters in the state or territory where the practice is physically located.

What are some examples of MA professional development topics that other practices have selected?

Examples of training categories include practice improvement, enhanced workflows, chronic disease management, and healthy team goals.

The materials in this toolkit cover the following topics:

- Professionalism in the medical assistant role
- Diabetes management and prevention
• Hypertension, obesity, and hyperlipidemia
• Health literacy
• Hospice

You may also want to consider developing your own materials on these topics:
• Panel/population health management
• Cancer screening criteria
• Conducting behavioral health screens
• Delivering normal laboratory results
• Community resources for patients

2 Select a Program Leader

The medical assistant professional development program leader should have strong clinical skills as well as an interest in the training and professional development of others. The leader may be a physician, nurse, physician assistant, nurse practitioner, nurse care coordinator, or medical assistant supervisor.

The program leader will work with other practice stakeholders and the medical assistant supervisor to design each session's curriculum and materials. The program leader’s responsibilities may include:
• Scheduling sessions during dedicated times
• Facilitating and leading training sessions
• Adapting content and materials to fit your practice's needs
• Coordinating with guest presenters

3 Assemble the Curriculum and Educational Materials

The educational materials you use during the medical assistant professional development sessions should be concise and straightforward. Flashcards that define the topic and contain essential information or an outline of
the content that will be covered make excellent pre-session learning tools. Handouts, activities, and teaching aids are ideal to use for the session itself. These materials and tactics will enable the MAs to grasp, retain, and revisit the information covered in the session.

At the end of each session, share tools to help the MAs apply their new knowledge. For example, if the MAs learned about diabetes management, consider practicing with a sample script for having conversations with patients about diabetes management or instructions on when to involve the diabetes educator. You may find a patient who is willing to assist in a training-role to have MAs practice their interactions.

You can customize the supplemental flashcards below for your training sessions to supplement the curriculum. They cover basic medical terminology and information to help medical assistants reach their full potential.

**Supplemental Flashcards—Basic Medical Knowledge**

*MS WORD, 56 KB*

**Q&A**

**Should I develop my training materials from scratch, or are there prepackaged materials I can use?**

For most of the common topics, you do not have to create your own training materials. You can start with the handouts and activities included in this toolkit. For additional resources, use vetted health education resources, peer-reviewed journal articles, and your specialty's professional society guidelines. You can start by reviewing the educational resources available from the American Association of Medical Assistants and other organizations, such as the American Diabetes Association, the National Diabetes Education Program, and the American Heart Association, which often have dedicated training materials available on their websites. Always obtain permission to use and re-print materials created by other organizations.

The AMA STEPS Forward™ site includes toolkits that address various topics that may be appropriate for your medical assistant professional development program, including medication adherence and panel management. You can also find workflow design and optimization resources, including toolkits on team huddles, pre-visit planning, starting Lean health care, and implementing team-based care.

**Is it important to use pre-session learning tools for each session?**

Yes. Try to provide similar tools for each session to develop a consistent framework. These tools enable the medical assistants to acclimate to the training style and feel prepared for each session. The tools should be lean, consistent, and scalable as the program continues to grow.

**Execute and Evaluate the Training**

Talk to your medical assistants about the new professional development program, including what they can expect from the sessions and what will be expected of them. The rest of the practice team should also be aware of when the professional development sessions will occur. The sessions should occur during working hours, and medical assistants should be compensated for their time. Inform all session participants whether they should bring their breakfast or lunch to the session. Start and end on time.

Check in with physicians, medical assistants, and other team members regularly to see if the training is helping the medical assistants gain new competencies and improve their contributions to the practice. Use the collective feedback to continue to improve the professional development series. As medical assistant competencies and capabilities evolve, augment medical assistant roles as appropriate and in compliance with applicable laws.

You may also want to develop a pre- and post-session assessment to ensure that the learning objectives are met.
How should we make sure the training sessions are successful from the medical assistants' perspective?

Check in with the medical assistants regularly—for example, one week after each session—and ask what they thought about the most recent session, what they think of the program so far, how lessons learned from the most recent session are fitting in with their work, and if they have any questions.

To make the sessions, and the training program overall, the most effective they can be, consider the following activities:

- Play games or do activities to test and reinforce the teachings at the end of each session.
- Administer a brief survey (5 questions or fewer) at the end of each session to make sure the content and format are effective.
- Use verbal teach-back style questioning to confirm the impact of the training. If you're using this approach, you might ask, “What are the 3 most important things you learned about health literacy?”
- Conduct a follow-up survey at the end of the year-long program to see what sessions resonated most with the medical assistants and how they are using what they learned in their daily work. At this point, it might be worth revisiting a popular topic or one that requires some additional reinforcement.

How should we evaluate the program?

Using data from the pre- and post-session assessments can indicate whether the program is positively affecting medical assistants’ confidence, understanding of clinic workflows, performance in their role, and job satisfaction. These are easy to measure and provide valuable insight. You may also consider gathering feedback from the medical assistants, other care team members, and patients using end-of-year surveys.

Monitor any new skills or processes that should be used regularly after each session, such as a new protocol for documenting information in the medical record or a better approach to measuring blood pressure during the rooming process. A practice coach (who could be the person who gave the training or another member of the practice team) or the MA supervisor can shadow the medical assistants to ensure that they understand and are using the new skill or process. These audits give the opportunity for ongoing coaching and feedback. Your practice may also choose to monitor metrics on your patient satisfaction survey related to medical assistant professionalism and clinical care.

How can we maximize the impact of our program?

Involve an interdisciplinary team when executing the program in your practice. This approach lends credibility to the program and promotes success. Consider linking sessions to other practice activities to improve engagement. For example, if your clinic sees many patients with diabetes, hold training on the importance of preparing patients for diabetic foot exams in advance of National Diabetes Month, which is in November. You may also consider connecting your training topics to statewide or national health initiatives.

Team-based presentations may help your medical assistants get the most out of the training. Bringing in outside speakers who are experts on various topics, such as a nurse practitioner with hospice experience, or having 2 team members co-present on a pilot they've participated in can be very effective and engaging.

Do we need to pilot the new program, or can we roll it out all at once?

If you have more than 10 medical assistants in the practice, consider piloting the professional development program in 1 or 2 pods or teams within the clinic. Five or 6 MAs would be able to give valuable feedback about the teaching methods and delivery of material in these pilot sessions.
Depending on how often you decide to hold sessions, plan to run the pilot for 4 to 6 sessions or up to 6 months. Communicate with the other medical assistants and teams in the practice that are not part of the pilot so they know that they will be included in the program's official rollout and when that will occur. It is important to emphasize the importance of medical assistant development with the practice team and to communicate the benefit of improving patient care and enhancing professional satisfaction.

Conclusion

Professional development training is a valuable tool to engage and educate your medical assistant team. Making the effort to develop tailored lessons can improve your practice culture, workflow, and team dynamics. A team of well-trained medical assistants can enable the practice to adopt a team-based care model, take better care of patients with greater efficiency, and increase satisfaction for patients as well as all members of the care team.

AMA Pearls

Get medical assistants' input on their training needs

Take into account your medical assistants' interests and needs when developing your curriculum. Lessons personalized for your team will be well received.

Training promotes life-long learning for medical assistants
Life-long learning is a crucial aspect of developing a strong team, similar to the educational commitment that physicians, nurses, and other health care providers make. Medical assistant professional development programs mirror the continuing education that others in your clinic receive.

Further Reading

Journal Articles and Other Publications

- Merriman B, Ades T, Seffrin JR. Health literacy in the information age: Communicating cancer information to patients and families. *CA: Cancer J Clin.* 52(3):130–133. doi:10.3322/canjclin.52.3.130

Videos and Webinars


Websites

- Health literacy studies: resources. T.H. Chan School of Public Health, Harvard University. www.hsph.harvard.edu/healthliteracy/resources

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