Optum MA Training Manual Sample

# 1. Introduction

This training manual was developed to help both new and experienced medical assistants (MAs) follow a standardized rooming workflow at a primary care clinic. Its purpose is to ensure that all MAs operate with consistency, professionalism, and sensitivity, especially when gathering personal patient information. By aligning staff with a unified process, the clinic can improve patient experience, meet performance metrics, and maintain compliance with internal policy and external standards.  
  
The content in this manual is based on real workflow implementation, with guidance from leadership and informed by live clinical experience. It is intended for use by:  
- New MAs during onboarding  
- Existing MAs adapting to updated workflows  
- Clinic leadership seeking process alignment and policy oversight

# 2. Standard Rooming Workflow Overview

The following steps outline the general patient rooming process used across visit types:  
1. Greet the patient in a professional, friendly manner.  
2. Verify patient identity using two identifiers (e.g., name and date of birth).  
3. Review reason for visit as listed in the appointment details.  
4. Clarify visit details with the patient to provide useful context for the provider.  
5. Update medications and allergies based on patient input.  
6. Update medical history and care team info, as needed.  
7. Complete age-specific or insurance-specific screenings (e.g., CORE metrics for Medicare).  
8. Take and record vital signs accurately.  
9. Document all intake information promptly and thoroughly in the EHR.

# 3. Follow-Up Visit Workflow

A follow-up visit typically includes checking in on previously identified concerns or ongoing conditions.  
  
Standard steps:  
- Confirm reason for follow-up and expected provider focus.  
- Review and verify medications, allergies, and relevant history.  
- Collect vitals and address any overdue screenings or health maintenance items.  
- Address any CORE metric requirements based on patient insurance (e.g., A1c, BP control).  
- Document updates using structured EHR fields for maximum clarity.

# 4. Wellness Visit Workflow

Wellness visits (including annual physicals and Medicare wellness exams) require a more detailed intake:  
- Confirm reason for visit (e.g., Medicare AWV, annual physical).  
- Complete full medication, allergy, and medical history review.  
- Ask age-specific health screening questions (e.g., immunizations, fall risk).  
- For patients 65+, conduct a brief cognitive screening if appropriate.  
- Review social history elements (e.g., tobacco, alcohol, physical activity).  
- Take vitals and document in accordance with wellness templates or flowsheets.  
  
Patients should be made aware that some questions may be personal and can choose not to answer. The MA should inform the provider of any declined topics or sensitive responses prior to the visit.