

MEDICAL ASSISTANT ROOMING POSTER

ROOMING WORKFLOW CHECKLIST (MA VERSION)

1. PRE-ROOMING SETUP

- Confirm appointment type and interpreter needs
- Review chart for HRA completion status
- Prepare screening tools (if done in-room)

2. MEMBER CHECK-IN

- Confirm identity (2 identifiers)
- Confirm preferred language + document interpreter
- Verify contact info & pharmacy

3. VITALS & REQUIRED DATA

- BP, HR, Temp, Weight/BMI, O2 Sat (as relevant)
- Update allergies, medications, immunization history

4. REQUIRED SCREENINGS (FOLLOW POLICY)

- Administer BH screens if assigned (PHQ-2/9 etc.)
- Administer SDOH screen if assigned
- Document results + notify provider of positives

5. SAFETY RED FLAGS (IMMEDIATE ESCALATION)

- SI/HI or concerning BH responses
- Chest pain, shortness of breath, very high BP
- Safety/IPV disclosures
- No food today / urgent SDOH → alert provider

6. ROOM PREP & PROVIDER HANDOFF

- Summarize vital signs & screening flags
- Load required templates/screens in EHR
- Ensure patient is comfortable & ready

7. POST-ROOMING TASKS

- Submit completed screeners
- Ensure interpreter connected as needed
- Assist with labs/immunizations after visit

REMEMBER

- Document everything accurately and promptly
- Notify provider immediately about any clinical concerns
- Support trauma-informed, culturally responsive care