

MA Duties Effective August 19th, 2026

Stef- Remote. Monday to Friday 7am-5pm.

Lead MA/Referral Coordinator/Updax Processor/Medication Prior Auth coordinator for all providers except Dr. Keeling. Will also be MA triage coordinator (once new office phone system is installed) ***See additional page for list of exact responsibilities and time frame for each***

Rachelle- Assistant Lead MA. JK rooming, reminders, results, pt call backs, voicemails, refills (refills incoming via paper, pt/pharmacy calls, portal/text messages in house MA's are still responsible for and will complete daily) Assistant MA Lead responsibilities as discussed with Stef and Laura that will come in stages and that have been communicated via AC messaging from Stef to MA's on 8/17/26. Rachelle and Stef will work together with training, education, coverage, projects, MA adherences to protocols and tasks as they arise. *** See additional page for list of exact responsibilities and time frame for each ***

Tonya – Remote. Monday – Friday 530pm/6pm until responsibilities complete. All **electronic** incoming refill requests, Dr. Keeling's medication prior auth requests, and importing labs/imaging.

Jenn – AF rooming, reminders, results, pt call backs, voicemails, refills (refills incoming via paper, pt/pharmacy calls, portal/text messages in house MA's are still responsible for and will complete daily) clinic supply ordering

Jordan – AM rooming, reminders, results, pt call backs, voicemails, refills (refills incoming via paper, pt/pharmacy calls, portal/text messages in house MA's are still responsible for and will complete daily) instrument coordinator (checking to see what items are needed, outdated, any new things needed, etc.) hospital tracking coordinator

Noah – RM rooming, reminders, results, pt call backs, voicemails, refills (refills incoming via paper, pt/pharmacy calls, portal/text messages in house MA's are still responsible for and will complete daily). Sports Med DME ordering, HA injections ordering, assistant MA Trainor to Rachelle (for the time being while he is still in clinic). Leah will work with Noah in training for MA role with RM. Any changes with training for Leah will be made by Laura and Rachelle.

Kendal – ET rooming, lab results, voicemails (8/17/26 – 8/31/26 then check in with Stef 8/31 for next staging of MA duties for ET) back up Medication PA coordinator when Stef is off or not available. Stef will continue with ET's refills/ imaging orders/reminders/Tenex coordination and will delegate pt call backs/reminders to Kendal as they both see appropriate. Once Kendal has fully taken on all ET's MA responsibilities, Stef will send out communication on this to the staff.

Nicholas – SS rooming, reminders, results, pt call backs, voicemails, refills (refills incoming via paper , pt/pharmacy calls, portal/text messages in house MA's are still responsible for and will complete daily). Back up Updax MA that will send all consults, print items that require provider signature/or that just need to be given to the MA when Stef is off or not available. On Wednesdays (float day), go through autoclave instruments to check for expired sterilization packets.

Yareth/Zack – MA floats. Will cover providers/MA's as needed and assigned by Rachelle and Laura. Will also work to cover lab and other projects.

FLOATS - If you are listed as a float on the schedule, duties will include making sure rooms are stocked, biohazard bags/bins are empty in all rooms including procedure room. Also check to make sure biohazard containers are not full – if you change one, let Charlene know. Please see Rachelle with any questions or extra duties.

Stef

Will maintain Lead MA/Referral Coordinator Role. Will continue same Lead responsibilities with the addition of two roles.

Medication Prior Auth Coordinator – Will handle all med prior auths., with the exception of Dr. Keeling's. This includes starting PA via cover my meds or phone call to insurance, documenting in chart process started, updating chart with status, and documenting decision. Stef will communicate to patients outcome and discuss with provider if additional info/decision is needed. When Stef is off/unavailable , Kendal will do this process.

MA Triage Line – Once remote phone is set up and live, Stef will handle incoming patient triage calls. This includes being in communication with providers and documenting triage calls and decisions. If Stef is not available – all MA's will take triage calls. ***Goal is for mid to end of September, but subject to change if any IT concerns arise. Laura and Stef will send out communication once this is set and live. Until then, MA's will continue to triage calls as normal***

Referral Coordinator – Will continue to handle/oversee all provider and patient referral requests. This includes sending referrals, records, and setting reminder tracker for schedule update and records. Also will be in communication with different clinics to update referral processes according to their practices.

Updax Processor – Will continue to be the MA that will handle Updax. This includes sending all consults to providers, incoming patient portal messages, ensuring incoming lab/imaging results are in chart, printing on call results, items that require provider signatures, refill requests,

patient forms that need completing and any other items that need printed. If Stef is off or not available, she will assign an MA for this responsibility.

Additional future projects – Will handle updating the rolodex, including adding, deleting, updating contact info, provider names, locations etc. Any changes that staff are made aware of should be directed to Stef for updating. This will be done in phases over the next 3 months.

In Clinic Emergency Patient Protocol – Will work with Rachell and Laura on developing “crash kart” as well as policies, procedures manual and future emergency drills.

Lab Competency Checklist – Will work with Rachelle and Laura in developing a competency list that newer MA’s will be required to show accuracy. This includes minimum requirements for adults, geriatric, and pediatric draws, difficult draws and technique, as well as any additional lab testing.

Rachelle – Will continue as Dr. Keeling’s Medical Assistant and add the following Lead MA Assistant roles:

Oversee call in’s and coverage with Laura. Time off, leave early/come in late/switching days will go to Rachelle and Stef. They will work together looking at clinic needs and staff available.

Rachelle will be the in-clinic MA for training and handling issues that arise. Including training newer MA’s and signing off on minimum of 10 IM and SQ vaccines in adult and peds as well as ensuring correct documentation. Will work with Laura overseeing MA’s day to day workflow as well as working with Charlene in MA training for in lab and providing coverage when Charlene is not available. Will have weekly meetings with Stef for overall check in. Assist in training, education and MA meetings. Will also be 2nd in command for Referral Coordinator when Stef is off or not available. Will work with Stef and Laura for flu clinic scheduling and staff coverage. Any new POC testing training, autoclave spore testing/training/schedule/maintenance concerns. Will work with Laura in setting up logins for MA’s to Epic, Corhio, Children’s, etc. Rachelle and Stef will sit down with new MA’s after designated training time frame and check in.