



## Medical Assistant Externship Best Practices Guide

*This document is maintained by the Health Improvement Partnership on behalf of the Medical Assistants Workgroup and is updated on a monthly basis. For questions or to suggest a resource to add, please contact Maria Estela Jerezano at [mjerezano@hipscc.org](mailto:mjerezano@hipscc.org).*

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### **Introduction**

Convened by the Health Improvement Partnership of Santa Cruz County, the Medical Assistant Workgroup members work to align messages and guidance on developing the medical assistant workforce in Santa Cruz County.



## **Medical Assistant Externship Best Practices Guide**

### **Document Purpose**

This guide is designed to support healthcare employers and medical assistant training programs in preparing employees for medical assistant externships, providing best practices for externships, and enhancing students' experience and hiring process.

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### **Training Programs**

#### **[Cabrillo College Medical Assisting Program](#)**

The program is full-time and intensive. It is designed to result in a Medical Assisting Certificate of Achievement, including completion of externship hours. Our program faculty are trained professionals who have real-world experience in the field of medical assisting and are committed to the successful completion of the program. All courses are on-campus classes, full-time, for two consecutive semesters. The following third semester will be off campus, in a clinical externship site to complete 180 clinical hours. Students will obtain and perform a variety of clinical and administrative skills for use in a medical office or outpatient clinical setting and will be prepared to sit for the American Medical Technologist Registered Medical Assistant National (AMT RMA) exam. The Cabrillo College Medical Assisting Program is proud to offer an Associate of Science Degree and/or a Certificate of Achievement in Medical Assisting.

#### **[Santa Cruz County Office of Education Career and Adult Learning Services Medical Assisting Program](#)**

This 10-month course teaches the necessary skills and knowledge needed to perform the duties of a medical assistant. Students participating will understand the role of both the administrative and clinical medical assistant. Upon successful completion of the course, the student will be able to apply the basic principles of medical assisting in both an administrative and clinical setting with a high level of accuracy, professionalism, and empathy, preparing them for either national, American Medical Technologist Registered Medical Assistant National (AMT RMA) exam or state, California Certifying Board for Medical Assistants (CCBMA) certification.



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### [Watsonville/Aptos/Santa Cruz Adult Education Clinical Medical Assisting](#)

This program includes 140 hours of classroom lectures and hands-on labs and is intended for students who want to prepare for an exciting, challenging, and rewarding career in healthcare. This class will prepare students to pass the National Healthcareer Association Clinical Medical Assistant exam. Students will learn how to perform back office medical assistant clinical duties including preparation of patients for examination, infection control, giving injections, and operating electrocardiographs (EKG). Instruction includes among other things preparing patients for examination and treatment, routine laboratory procedures, diagnostic testing, technical aspects of phlebotomy, and the cardiac life cycle. Students will review important topics including phlebotomy, pharmacology, the proper use and administration of medications, taking and documenting vital signs, cardiology including proper lead placements, professional workplace behavior, ethics, and the legal aspects of healthcare.

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### **Onboarding Resources**

Onboarding is the process where new hires gain the skills, knowledge, and capabilities they need to become productive employees of an organization. A well-executed onboarding leads to better outcomes and higher retention rates. The best onboarding process finds the balance between the employee's needs, helping them embody the company's culture and practical moments that are unplanned. Utilizing an onboarding checklist will give new hires the confidence they need to have a successful start to their position in a new organization.

### **What to include in an onboarding checklist?**

Here are a few things every onboarding checklist should have:

- Recruitment process
  - ◆ Complete HR documents
- Role of the employee
- Goal setting
- Job training
  - ◆ Assign training materials
  - ◆ Assign a mentor
- Introduction to company culture
- Dates scheduled for check-ins



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→ Meeting with other employees or superiors

### Sample checklists

- Golden State Orthopedics & Spine (GSOS)
    - ◆ [Checklist Manifesto](#)
    - ◆ [Clinical Checklist](#)
    - ◆ [Onboarding GSOS Clinical](#)
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### [myClinicalExchange](#)

Employers and training programs can support students by assisting them with the myClinicalExchange onboarding process. myClinicalExchange is an information technology professional services organization specializing in e-business solutions for our clients. Its mission is to provide quality technology solutions that help impact the education of students in the 21st century. myClinicalExchange system has been used to track several thousand students' clinical rotations each year across different programs including nursing, pharmacy, and allied health in a streamlined, efficient, and organized manner.

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### Externship Templates and Sample Resources

- **Application**
  - ◆ [Cabrillo College Information Form](#)
  - ◆ [Cabrillo College MA 101 Extern Supplemental Packet Requirements](#)
  - ◆ [Cabrillo College MA Clinical Externship Placement Application](#)
  - ◆ [Packet Checklist](#)
  - ◆ [Cabrillo College Paperwork Cover Sheet](#)
- **Externship Checklist and Learning Objectives**
  - ◆ [Cabrillo College Class Checklist](#)
  - ◆ [Cabrillo College Learning Objectives](#)
- **Compliance**
  - ◆ [Cabrillo College Externship Agreement](#)
  - ◆ [Cabrillo College Health Requirements](#)
  - ◆ [Cabrillo College MA 101 Clinical Compliance Steps](#)



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- ◆ Cabrillo College Time Card
- ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Health Screening
- ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Program Training Agreement
- **Competency**
  - ◆ Cabrillo College MA Competency Checklist
  - ◆ Cabrillo College Skills Checklist
- **Evaluations**
  - ◆ Cabrillo College Student Evaluation
  - ◆ Cabrillo College Employer Evaluation
  - ◆ Cabrillo College Student Evaluation of Practicum Site
  - ◆ Cabrillo College Practicum Evaluation of Student
  - ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Program Student Evaluation
  - ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Program Internship Hours Record
  - ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Program Internship Contract Hours
  - ◆ Career and Adult Learning Services (CALS) Work-Based Learning (WBL) Program Time Card
- **Surveys**
  - ◆ Cabrillo College Student Survey of Program Resources
  - ◆ Cabrillo College Graduate Survey

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### **Supervision and Mentorship Resources**

The aim of mentorship is to build the mentees capacity, enhance their skills and improve their ability to produce desired outcomes. However, the mentoring relationship is vulnerable to a number of challenges that may undermine its effectiveness and sustainability<sup>1</sup>. Some common

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<sup>1</sup> PubMed, [Developing mentorship in a resource-limited context: a qualitative research study of the experiences and perceptions of the makerere university student and faculty mentorship programme](#), July 2017



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goals of externship mentoring programs include: providing training and development opportunities for externs, helping externs adjust to the workplace culture, giving externs exposure to different aspects of the company, and building relationships with future employees. Mentoring involves both a coaching and an educational role, requiring a generosity of time, empathy, a willingness to share knowledge and skills, and an enthusiasm for teaching and the success of others. Being mentored is believed to have an important influence on personal development, career guidance and career choice.<sup>2</sup>

- [The Balance: Qualities of A Good Mentor](#)
- [The Muse: 6 Ways To Be a Great Boss to Your Intern](#)
- [UC Davis Human Resources: Mentoring Toolkit:](#)
  - ◆ [The Mentoring Relationship](#)
  - ◆ [Benefits of Mentoring](#)
  - ◆ [Types of Mentoring](#)
  - ◆ [Being A Mentor](#)
  - ◆ [The Mentoring Process](#)
  - ◆ [Development Goals](#)
  - ◆ [Preparing for Closure](#)
  - ◆ [Resources](#)
    - [Active Listening Skills](#)
    - [Dialogue Prompts](#)
    - [Do I Have What it Takes To Be a Mentor?](#)
    - [Sample Meeting Agenda](#)
    - [Sample Mentoring Agreement](#)
    - [Sample Progress Check](#)

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### **Improving Students' Experience**

Externships will offer students an extensive job shadowing opportunity that will involve a lot of observation, and an employer must ensure that their externs are gaining first-hand insight into medical assistant careers and the healthcare industry. In order to improve students'

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<sup>2</sup> PubMed, [Mentorship in the health professions: a review](#), June 2018



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experiences, employers should treat this opportunity as a way to hire new talent and expand their workforce.

Here are a few recommendations that can help improve students' experience:

- Be supportive in the office
- Hold them accountable
- Play up the culture
- Offer flexible work options
- Schedule regular check-ins
- Conduct exit interviews

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### Canvas by Instructure

Canvas is a learning management software that integrates digital tools and resources dedicated to elevating student success, inspiring collaborative learning, and amplifying the power of teaching through professional development, content, connected user community, and open integrations. It is a cloud-based service where instructors and students interact, collaborate, teach, learn, and communicate through course sites developed by instructors. Canvas creates an easier way to manage programs and courses for students to work on assignments, review the material, and check their progress. This software cultivates students' time management and allows them the opportunity to organize their schedules and have a specific platform for all of their assigned tasks. Canvas was identified as a solution for Cabrillo College and Santa Cruz County Office of Education Career and Adult Learning Services (CALS).

Canvas will provide medical assistant students with a structural model for reviewing and completing externships and tools to document and track their training modules. This learning management system will work as a central location for student information that will allow employers to post announcements and other related content. It will encourage efficiency as there are notifications that alert students about deadlines and missing work.

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### **Mock Interviews**

Mock interviews are a useful practice to integrate into a student's routine. Mock interviews are beneficial because they allow students to practice interview skills in a low-stress environment. Students can gain experience by answering commonly asked questions while also refining their speaking skills and professionalism.

### **Mock Interview Templates**

American River College

- [Email for Interviewers](#)
- [Mock Interview Schedule](#)
- [Mock Interview Score Sheet](#)
- [Question Set A](#)
- [Question Set B](#)
- [Question Set C](#)
- [Question Set D](#)
- [Question Set E](#)
- [STAR Response to Behavioral Interview Questions](#)

Cabrillo College

- [Medical Assistant Mock Interview Questions](#)

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### **Student Focus Groups**

Student focus groups will provide a holistic approach to exploring and discussing externships. Holding focus groups promotes self-reflection, allows students to see that they are not alone in how they feel about a topic, and can provide a unique look at their experience and perceptions. Students are more likely to be candid in a group, especially if others willingly share similar feelings. This approach fosters students' self-advocacy and allows them the opportunity to provide feedback on whether employers are following externship best practices guidelines. For example, the Dignity Health Student Focus Group Initiative holds focus groups via Zoom, with the intention to get the student's and school's feedback on the hospital and clinical placement. This allows students who have participated in externships to provide feedback.





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### → How to conduct a focus group

Focus groups are essentially small group interviews. They are referred to as “focus groups” because the group itself can have a common attribute (e.g. students.), the group might have a focus (e.g. medical assistants), or have all gone through the same experience (e.g. externships). Holding focus groups with students provides specific insight and perspectives that only a student can provide about learning and the curriculum.

### → How do focus groups contribute to assessment?

Data collection assessment: indirect data measures students’ attitudes and perceptions. Indirect data collection can be performed through focus groups, interviews, reflective essays, and surveys.

## Student Focus Group Resources

- [Techniques for Conducting Focus Groups](#)
- [Focus Group Guide - Center for Community College Student Engagement \(CCSSE\)](#)

## Sample Student Focus Group Questions

1. How was your experience with the student onboarding process?
2. What challenges, if any, did you face?
3. At which location did you do your clinical rotation or rotations?
4. What departments were you placed in?
5. How long were your rotations?
6. How was your experience on arrival at the department?
7. Was it organized and easy to connect with your preceptors?
8. Did you feel welcomed into the departments?
9. How was your experience with your preceptor?
10. Did you feel that the facility preceptors had an idea of your current experience level?
11. Did you feel included in the department functions appropriate to your learning level during the time you spent in the departments?
12. What positive experiences, if any, did you have during your rotation?
13. What negative experiences, if any, did you have during your rotations?
14. What was your overall experience during the time you spent on rotation?



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15. Have you done your clinical rotations at any other facilities outside of our organization?
  16. If so, would you rate your experience here better, worse, or the same? Please elaborate.
  17. Would you like to return to DH for another clinical rotation? Why or why not?
  18. What can we do to make the clinical experience better for you? Please provide suggestions, recommendations, and thoughts.
  19. How do you feel about the focus group concept? Do you feel it is beneficial? Why or why not?
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### **Certification and Hiring Process**

It is recommended that training programs incorporate taking certification exams into curriculum and program requirements prior to completion to prepare students for employment. Certification provides a pay increase and is required by many employers within specific timeframes (e.g. at Dignity Health certification is required within 6 months and at Sutter Health certification is required within 12 months).

#### **Certification/Exams**

- [American Medical Technologists \(AMT\) Registered Medical Assistant \(RMA\)](#)
- [California Certifying Board for Medical Assistants \(CCBMA\)](#)

#### **Hiring Process**

It's recommended that employers hire directly from externships; lengthy and complicated hiring processes may intimidate students, online job applications may be confusing, and students either lose interest or pursue other positions in the meantime. Employers can help reduce barriers, such as confusing applications and requiring students to commute long distances for interviews, by hosting information sessions or on-campus interviews at training sites; this allows a recruiter to meet and interview multiple students. Employers are invited to schedule an information session about their company, discuss the hiring process, and conduct on-campus interviews at Cabrillo College, email [studentjobs@cabrillo.edu](mailto:studentjobs@cabrillo.edu), and at Santa Cruz County Office of Education Career and Adult Learning Services, email



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[lmacondray@santacruzcoe.org](mailto:lmacondray@santacruzcoe.org). Collaboration among externship employers to place extern graduates into permanent positions, at any location, is encouraged as well.

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### **Job Descriptions**

→ [Medical Assistant Starter List: Job Description and Roles & Responsibilities](#)

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### **Health Resources and Services Administration (HRSA) Health Workforce Connector**

To streamline the recruitment process for medical assistants across the region, the recommendation is for employers to utilize a centralized online platform for posting medical assistant positions. The Health Resources and Services Administration (HRSA) created a Health Workforce Connector resource to connect skilled health professionals to communities in need. The site provides opportunities to search for thousands of employment and training opportunities in underserved communities nationwide.

→ [Health Workforce Connector](#)

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### **Talent Acquisition and Onboarding Resources**

- [National Association of Colleges and Employers \(NACE\): Talent Acquisition Best Practices](#)
  - [National Association of Colleges and Employers \(NACE\): Key Factors When Choosing Between Equal Candidates for Jobs, Internships/Co-Ops](#)
  - [National Association of Colleges and Employers \(NACE\): Onboarding - Talent Acquisition](#)
    - ◆ [Technology the Catalyst for Generational Differences](#)
    - ◆ [Onboarding Done Right: New Hire Engagement Is the Key](#)
    - ◆ [Creating a Plan for Onboarding Success](#)
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### **Additional Resources and Reports**

- [California Primary Care Association: Medical Assistant Development Toolkit for Clinical Managers and Supervisors](#)
- [Healthforce Center at UCSF: Medical Assistants](#)
- [Jobs for the Future: California's Health Care Solution: The California Endowment's 21st Century Pathways to Health Careers](#)
- [Medical Board of California: Medical Assistants - Is Your Medical Assistant Practicing Beyond their Scope of Training?](#)
- [National Association of Colleges and Employers \(NACE\) Position Statement: U.S. Internships](#)
- [National Association of Colleges and Employers \(NACE\): Principles for Ethical Professional Practice](#)
- [The Jobs to Careers: Work-Based Learning Self-Assessment Tool](#)
- [The Jobs to Careers: Work-Based Learning Worksheet](#)