## Medical Assistant Self-Management Cycle

### Check off List

**Medical Assistant:** ________________________________  **Date:** ________________________________

<table>
<thead>
<tr>
<th>TASK</th>
<th>REVIEWED</th>
<th>PERFORMED</th>
<th>COMPETENT</th>
</tr>
</thead>
</table>

### Initial Phone Call:

- Introduced Planned Visit
- Introduced Idea of Self-Management
- Scheduled appointment with PCP for Follow-up

### Planned Visit:

- Standing Order Form (PCP to sign first)
- Vitals
- Foot checks
- Labs
- Referrals
- Immunizations
- Set Self-Management Goal
  - Give Example: What: __________________________
  - Where: _______________________
  - How Long: ______________________
  - When: _________________________
  - Score: ________________________
- Call Back Card done

### Data Input-CDEMS

### Provider Visit Form

### Data Input

- See copy of **Provider Visit Form**
- Input new goals
- Medication changes

### Two Week Call Back

- Check on patient’s goals
- Redefine, Change, & Encourage patient to continue with goal

Reviewed & completed by: ________________________________