

Medical Administrative Aspects

Course Outcome Summary

Course Information

Description

Provides an introduction to the administrative skills needed for a medical office. Students learn how to maintain medical records (both paper and electronic), manage appointments, and perform routine office duties. Focuses on the financial aspects of the medical office including accounts payable and accounts receivable. Students examine billing and collection procedures.

Types of Instruction

Instruction Type

Credits

4

Exit Learning Outcomes

Program Outcomes

- A. Communicate effectively nonverbally, orally, and in writing
- B. Perform medical business practices

External Standards

- II.C.1. Demonstrate knowledge of basic math computations
- II.C.2. Apply mathematical computations to solve equations
- IV.C.1. Identify styles and types of verbal communication
- IV.C.2. Identify nonverbal communication
- IV.C.3. Recognize communication barriers
- IV.C.4. Identify techniques for overcoming communication barriers
- IV.C.5. Recognize the elements of oral communication using a sender-receiver process
- IV.C.8. Recognize elements of fundamental writing skills
- IV.C.9. Discuss applications of electronic technology in effective communication
- IV.C.12. Organize technical information and summaries
- IV.C.15. Discuss the role of assertiveness in effective professional communication
- IV.P.2. Report relevant information to others succinctly and accurately
- IV.P.4. Explain general office policies
- IV.P.7. Demonstrate telephone techniques
- IV.P.10. Compose professional/business letters
- IV.P.11. Respond to nonverbal communication
- IV.P.12. Develop and maintain a current list of community resources related to patients healthcare needs
- IV.P.13. Advocate on behalf of patients
- IV.A.1. Demonstrate empathy in communicating with patients, family and staff
- IV.A.2. Apply active listening skills
- IV.A.3. Use appropriate body language and other nonverbal skills in communicating with patients, family and staff

- IV.A.4. Demonstrate awareness of the territorial boundaries of the person with whom communicating
- IV.A.5. Demonstrate sensitivity appropriate to the message being delivered
- IV.A.6. Demonstrate awareness of how an individual's personal appearance affects anticipated responses
- IV.A.7. Demonstrate recognition of the patient's level of understanding in communications
- IV.A.8. Analyze communications in providing appropriate responses/ feedback
- IV.A.9. Recognize and protect personal boundaries in communicating with others
- IV.A.10. Demonstrate respect for individual diversity, incorporating awareness of one's own biases in areas including gender, race, religion, age and economic status
- V.C.1. Discuss pros and cons of various types of appointment management systems
- V.C.2. Describe scheduling guidelines
- V.C.3. Recognize office policies and protocols for handling appointments
- V.C.4. Identify critical information required for scheduling patient admissions and/or procedures
- V.C.5. Identify systems for organizing medical records
- V.C.6. Describe various types of content maintained in a patient's medical record
- V.C.7. Discuss pros and cons of various filing methods
- V.C.8. Identify both equipment and supplies needed for filing medical records
- V.C.9. Describe indexing rules
- V.C.10. Discuss filing procedures
- V.C.11. Discuss principles of using Electronic Medical Record (EMR)
- V.C.12. Identify types of records common to the healthcare setting
- V.C.13. Identify time management principles
- V.C.14. Discuss the importance of routine
- V.P.1. Manage appointment schedule, using established priorities
- V.P.2. Schedule patient admissions and/or procedures
- V.P.3. Organize a patient's medical record.
- V.P.4. File medical records
- V.P.5. Execute data management using electronic healthcare records such as the EMR
- V.P.6. Use office hardware and software to maintain office systems
- V.P.7. Use internet to access information related to the medical office
- V.P.8. Maintain organization by filing
- V.P.9. Perform routine maintenance of office equipment with documentation
- V.P.10. Perform an office inventory
- V.A.1. Consider staff needs and limitations in establishment of a filing system
- V.A.2. Implement time management principles to maintain effective office function
- VI.C.1. Explain basic bookkeeping computations.
- VI.C.2. Differentiate between bookkeeping and accounting
- VI.C.3. Describe banking procedures
- VI.C.4. Discuss precautions for accepting checks.
- VI.C.5. Compare types of endorsement
- VI.C.6. Differentiate between accounts payable and accounts receivable
- VI.C.7. Compare manual and computerized bookkeeping systems used in ambulatory healthcare
- VI.C.8. Describe common periodic financial reports
- VI.C.9. Explain both billing and payment options.
- VI.C.10. Identify procedure for preparing patient accounts

- VI.C.11. Discuss procedures for collecting outstanding accounts
- VI.C.12. Describe the impact of both the Fair Debt Collection Act and the Federal Truth in Lending Act of 1968 as they apply to collections
- VI.C.13. Discuss types of adjustments that may be made to a patient s account
- VI.P.1. Prepare a bank deposit
- VI.P.2. Perform accounts receivable procedures, including:
 - VI.P.2.a. Post entries on a daysheet
 - VI.P.2.b. Perform billing procedures
 - VI.P.2.c. Perform collection procedures
 - VI.P.2.d. Post adjustments
 - VI.P.2.e. Process a credit balance
 - VI.P.2.f. Process refunds
 - VI.P.2.g. Post non-sufficient fund (NSF) checks.
 - VI.P.2.h. Post collection agency payments.
- VI.P.3. Utilize computerized office billing systems
- VI.A.1. Prepare a bank deposit
- VI.A.2. Perform accounts receivable procedures, including:
 - VI.A.2.a. Post entries on a daysheet
 - VI.A.2.b. Perform billing procedures
 - VI.A.2.c. Perform collection procedures
 - VI.A.2.d. Post adjustments
 - VI.A.2.e. Process a credit balance
 - VI.A.2.f. Process refunds
 - VI.A.2.g. Post non-sufficient fund (NSF) checks.
 - VI.A.2.h. Post collection agency payments.
- VI.A.3. Utilize computerized office billing systems
- VI.A.1. Demonstrate sensitivity and professionalism in handling accounts receivable activities with clients
- VII.C.3. Discuss workers compensation as it applies to patients
- VII.C.4. Describe procedures for implementing both managed care and insurance plans
- VII.C.5. Discuss utilization review principles.
- VII.C.7. Describe how guidelines are used in processing an insurance claim
- VII.C.8. Compare processes for filing insurance claims both manually and electronically
- VII.C.9. Describe guidelines for third-party claims
- VII.C.10. Discuss types of physician fee schedules
- IX.C.1. Discuss legal scope of practice for medical assistants
- IX.P.1. Respond to issues of confidentiality
- IX.P.8. Apply local, state and federal health care legislation and regulation appropriate to the medical assisting practice setting
- IX.A.1. Demonstrate sensitivity to patient rights
- XI.C.10. Identify principles of body mechanics and ergonomics.

Competencies

- 1. Explain general office policies**
 - Properties**

Domain: Cognitive Level: Comprehension

You will demonstrate your competence:

- 1.a. in a written, oral, or graphic response
- 1.b. by answering questions on a test

Your performance will be successful when:

- 1.a. you summarize general office policies
- 1.b. you address the legal implications associated with confidentiality of patient and medical records
- 1.c. you provide verbal instructions to a patient on how to locate the medical office from your home.
- 1.d. you explain how and when each marketing tool could be used to increase the medical practice's visibility in the community
- 1.e. you design an office information brochure

2. Execute data management using electronic healthcare records such as the Electronic Medical Record (EMR)

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 2.a. in simulation assignment
- 2.b. by answering questions on a test

Your performance will be successful when:

- 2.a. you discuss principles of using Electronic Medical Record (EMR)
- 2.b. you simulate the use of the EMR

3. Perform an office inventory

Properties

Domain: Psychomotor Level: Practice

You will demonstrate your competence:

- 3.a. in a written or oral response
- 3.b. using a tracking system for medical supplies

Your performance will be successful when:

- 3.a. you describe how a spreadsheet is used to track supplies in a medical practice
- 3.b. you perform an office inventory
- 3.c. you explain what type of supplies must be maintained under lock and key
- 3.d. you verify the results of an inventory of supplies
- 3.e. you verify the receipt of a shipment of supplies with the purchase order against the packing slip
- 3.f. you reference warranty and service agreements for equipment
- 3.g. you identify three items needed for the administrative area of the medical office
- 3.h. you prepare a completed purchase order for needed supplies referencing
- 3.i. you describe the research performed on the internet or through catalogs to locate supplies for purchase

4. Document equipment maintenance

Properties

Domain: Cognitive Level: Analysis

You will demonstrate your competence:

- 4.a. in a written or oral response
- 4.b. using a tracking system for equipment maintenance

Your performance will be successful when:

- 4.a. you describes how a spreadsheet is used to track equipment maintenance and servicing
- 4.b. you perform routine maintenance of administrative and clinical equipment with documentation
- 4.c. you explain why performing routine maintenance of equipment reduces the risk of liability
- 4.d. you identify a maintenance schedule for equipment in a medical office
- 4.e. you reference the maintenance instructions from the operator's manual for the equipment
- 4.f. you document troubleshooting techniques for equipment that is not operating properly
- 4.g. you document the warranties and service agreements on equipment in the classroom

5. Demonstrate filing procedures

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 5.a. in a skill demonstration

Your performance will be successful when:

- 5.a. you verify signature(s) and/or other required medical information, such as transcription orders, prior to filing
- 5.b. you organize a patient's medical record
- 5.c. you use the department/facility filing and indexing guidelines to file manual client records
- 5.d. you add information to the manual client record
- 5.e. you retrieve information from the manual client record
- 5.f. you correctly document all forms removed from the manual client record
- 5.g. you cross reference files
- 5.h. you select the correct color-coded letters/numbers for color coding a client record
- 5.i. you apply filing and indexing rules when preparing labels for client documents

6. Demonstrate time management principles

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 6.a. in a written, oral or graphical response

Your performance will be successful when:

- 6.a. you develop a to-do list
- 6.b. you schedule meetings
- 6.c. you discuss delegating work assignments

7. Use the Internet to access information related to the medical office

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 7.a. by locating information on the Internet using search engines and directories
- 7.b. by completing an Internet written assignment

Your performance will be successful when:

- 7.a. you open browsing software
- 7.b. you navigate in the Internet using the software provided

- 7.c. you identify common search engines and directories
- 7.d. you use bookmarks to identify Uniform Resource Locators
- 7.e. you retrieve medical information from the Internet using search engines and directories
- 7.f. you narrow searches on the WWW using Boolean operators
- 7.g. you document references

8. Compose professional business documents

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 8.a. in the production of written documents including business letters, memos, resumes, cover letters, messages, faxes, and charts
- 8.b. using a computer, fax machine, scanner and other common medical office equipment

Your performance will be successful when:

- 8.a. you produce written documents using a computer, word processing software
- 8.b. you send a document using a facsimile machine
- 8.c. you duplicate documents using a copier
- 8.d. you respond to and initiate written communication as needed for the medical office
- 8.e. you use a scanner to scan and store a document
- 8.f. you proofread and edit documents before distribution
- 8.g. document is formatted correctly according to established guidelines
- 8.h. document is formatted to the appropriate size of the forms, stationary, and paper used in a medical office for various purposes
- 8.i. document reflects correct grammar and spelling
- 8.j. envelope is addressed according to postal OCR guidelines

9. Use practice management software

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 9.a. through simulation practice
- 9.b. answering questions on a test

Your performance will be successful when:

- 9.a. you manage appointment schedule, using established priorities
- 9.b. you schedule patient admissions and/or procedures
- 9.c. you discuss pros and cons of various types of appointment management systems
- 9.d. you describe scheduling guidelines
- 9.e. you recognize office policies and protocols for handling appointments
- 9.f. you identify critical information required for scheduling patient admissions and/or procedures

10. Maintain medical records

Properties

Domain: Cognitive Level: Analysis

You will demonstrate your competence:

- 10.a. in a simulation
- 10.b. written test questions

Your performance will be successful when:

- 10.a. you incorporate demographic data
- 10.b. you describe the differences between the components of the medical record
- 10.c. you explain the term "routing" as it pertains to the medical record
- 10.d. you describe the types of information that can be legally purged from a medical record
- 10.e. you describe the difference between source-oriented and problem-oriented medical records
- 10.f. you differentiate between active, inactive, and closed files
- 10.g. you illustrate the benefits of creating a database of patient information in the medical office
- 10.h. you explain why the physician is the legal owner of a patient's medical record
- 10.i. you include documentation of various types of patient information including progress notes, lab reports, consultation reports, and hospital reports
- 10.j. you adhere to the requirements for the retention of medical and business records in the medical office

11. Demonstrate professional telephone techniques

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

- 11.a. in a role play performance
- 11.b. given a scenario
- 11.c. in a written or oral reflection on the role play experience

Your performance will be successful when:

- 11.a. role play performance illustrates the correct technique to use when answering the telephone for a medical practice
- 11.b. role play performance illustrates how the use of the telephone can affect the image of the medical practice
- 11.c. role play performance illustrates proper telephone etiquette when receiving incoming calls to the medical office
- 11.d. role play performance illustrates the use of "hold" with several incoming calls
- 11.e. role play performance illustrates taking a message from a patient and correctly documenting the information
- 11.f. role play performance illustrates transferring a call to a fellow employee
- 11.g. role play performance illustrates how various kinds of calls should be handled according to the urgency of the situation such as emergencies, test results, referral requests, and patient appointments
- 11.h. role play performance illustrates the correct procedure to follow when a caller will not identify himself/herself
- 11.i. reflection explains how a breach of patient confidentiality can be avoided when using the telephone
- 11.j. reflection explains how incorrect use of the telephone can affect the image of the medical practice
- 11.k. reflection describes the role of answering machines, answering services, pagers, and electronic mail in the medical office
- 11.l. reflection identifies aspects of the role play performance that meet the expectations of a medical assistant
- 11.m. reflection identifies aspects of the role play that need improvement
- 11.n. reflection details how telephone techniques can be practiced and improved

12. Manage appointment admissions and procedures

Properties

Domain: Cognitive Level: Analysis

You will demonstrate your competence:

12.a. in a simulation

Your performance will be successful when:

12.a. you assess simulated phone calls to determine scheduling priorities

12.b. you schedule an appointment using an appointment book and appointment management software

12.c. you prepare an appointment card

12.d. you schedule new and established patients following the assigned practice guidelines for appointment scheduling

12.e. you document scheduling changes in the correct location in the appointment book and appointment management software

12.f. response includes documentation of the status of the appointment: late, no show, rescheduled or cancelled

12.g. response includes a scheduled inpatient surgical procedure

12.h. response includes a scheduled inpatient hospital procedure

12.i. response includes a scheduled outpatient admission procedure and follow-up of the patient's post surgical status

13. Apply accounting and bookkeeping principles

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

13.a. by answering questions on a test

Your performance will be successful when:

13.a. you explain basic bookkeeping computations

13.b. you differentiate between accounts payable and accounts receivable

13.c. you differentiate between bookkeeping and accounting

13.d. you compare manual and computerized bookkeeping systems used in ambulatory healthcare

13.e. you explain financial reports

14. Perform accounts payable procedures

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

14.a. in written, oral or graphic response

Your performance will be successful when:

14.a. you discuss common liability or financial obligations of the medical office

14.b. you prepare a check for accounts payable

14.c. you process employee payroll

14.d. you discuss governmental regulations pertaining to employee payroll

15. Perform accounts receivable procedures

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

15.a. in a classroom simulation

15.b. given a scenario

Your performance will be successful when:

15.a. you post entries on a daysheet

15.b. you perform billing procedures

15.c. you post adjustments

15.d. you process a credit balance

15.e. you process refunds

15.f. you post non-sufficient fund (NSF) checks.

15.g. you utilize computerized office billing system

15.h. you compare types of endorsement

15.i. you describe banking procedures

15.j. you compare manual and computerized bookkeeping systems used in ambulatory healthcare

15.k. you explain both billing and payment options

16. Practice collection procedures

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

16.a. in a classroom simulation/role play

16.b. given a scenario

Your performance will be successful when:

16.a. you follow an established payment plan according to the office policy manual

16.b. you identify types of adjustments that may be made to a patient's account

16.c. you explain why and when statements will be sent

16.d. you explain the billing options to a patient

16.e. you describe the different payment options available in a medical office

16.f. you explain age analysis of a delinquent account

16.g. you post a non-sufficient funds check

16.h. you post collection agency payments

16.i. you perform collection procedures

16.j. you describe the collection techniques available and when each should be used

16.k. you explain the legality of placing calls to patients homes or places of business for the collection of overdue accounts

16.l. you reference the Fair Debt Collection Act and the Federal Communication Act

17. Apply mail handling procedures

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

17.a. in a classroom simulation

17.b. in a written, oral response

Your performance will be successful when:

17.a. you process incoming and outgoing mail

17.b. you choose appropriate postal classes

17.c. you identify zip codes and state abbreviations

18. Utilize computerized office billing systems

Properties

Domain: Cognitive Level: Application

You will demonstrate your competence:

18.a. in a classroom simulation

Your performance will be successful when:

18.a. you prepare a computerized billing statement

18.b. you perform records adjustment using a computerized billing system

18.c. you identify accounts receivable using a computerized billing system

18.d. you prepare a superbill or patient ledger

19. Explain general office policies pertaining to practice finances

Properties

Domain: Cognitive Level: Comprehension

You will demonstrate your competence:

19.a. in a written, oral, and graphic response

Your performance will be successful when:

19.a. you perform day-end summaries

19.b. you discuss use of small claims court as pertaining to the medical office

19.c. you explain bankruptcy procedures for accounts receivable

19.d. you discuss policies for tracing "skips"

19.e. you describe the statutes of limitations for accounts receivable

19.f. you compare and contrast financial , managerial, and cost accounting

19.g. you recall three useful financial ratios

19.h. you discuss the impact of utilization review

19.i. you discuss legal and ethical guidelines in accounting practices

20. Demonstrate sensitivity and professionalism in handling accounts receivable activities with clients

Properties

Domain: Affective Level: Valuing

You will demonstrate your competence:

20.a. in a simulation or role-play

Your performance will be successful when:

20.a. you treat the client with respect

20.b. you use active listening skills

20.c. you ask questions to help discern the client's question or complaint

20.d. you express empathy if appropriate

20.e. you do not place blame or become defensive

21. Summarize office management duties

Properties

Domain: Cognitive Level: Evaluation

You will demonstrate your competence:

21.a. in a written, oral, and graphical response

Your performance will be successful when:

- 21.a. you describe the qualities of a manager
- 21.b. you differentiate among authoritarian and participatory management styles
- 21.c. you perform travel arrangements and prepare an itinerary
- 21.d. you discuss practice insurance and the development of risk management procedures
- 21.e. you identify common personnel problems
- 21.f. you discuss human resource management