

Medical Assisting: Medical Office Management

Exam Information	Description																		
Exam number 712	The Medical Assistant: Medical Office Management industry certification exam assesses learners' ability to support physicians by providing assistance during patient examinations, administering and monitoring treatments, and managing patient and related health record information. Learners demonstrate competency in performing clinical, administrative, and laboratory duties relevant to medical office management.																		
Items 53																			
Points 54	Exam Blueprint																		
Prerequisites None	<table><tr><th>Standard</th><th>Percentage of exam</th></tr><tr><td>1. Profession & role</td><td>4%</td></tr><tr><td>2. Legal & ethical issues</td><td>17%</td></tr><tr><td>3. Office environment</td><td>2%</td></tr><tr><td>4. Medical office communication</td><td>11%</td></tr><tr><td>5. Interpersonal communication</td><td>13%</td></tr><tr><td>6. Medical records</td><td>13%</td></tr><tr><td>7. Bookkeeping & financial functions</td><td>13%</td></tr><tr><td>8. Insurance, coding, & billing</td><td>26%</td></tr></table>	Standard	Percentage of exam	1. Profession & role	4%	2. Legal & ethical issues	17%	3. Office environment	2%	4. Medical office communication	11%	5. Interpersonal communication	13%	6. Medical records	13%	7. Bookkeeping & financial functions	13%	8. Insurance, coding, & billing	26%
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Recommended course length One semester																			
National Career Cluster Health Science																			
Performance standards Included (Optional)																			
Certificate available Yes																			

Standard 1

Students will explore the medical assisting profession and its role in the healthcare setting.

Objective 1 Describe the job responsibilities of a medical assistant.

1. Describe the training required for a medical assistant.
 - a. Compare and contrast endorsed, certified, and registered medical assistants.
 - i. State
 - ii. National
 - b. Describe the current Utah medical assistant job training requirements.
2. Compare administrative and clinical skills.
 - a. Administrative skills, including office management and clerical functions.
 - b. Clinical skills, including therapeutic procedures and diagnostic procedures.

Objective 2 Analyze characteristics needed for a quality medical assistant and apply the skills necessary for obtaining employment.

1. Examine the following workplace skills:
 - a. Positive attitude
 - b. Teamwork
 - c. Adapt to change
 - d. Communication skills
 - e. Professional appearance
 - f. Confidentiality (verbal and written correspondence)
 - g. Exhibit initiative
 - h. Cultural competency
 - i. Integrity
 - j. Discretion
 - k. Organize and prioritize
 - l. Continuing education
 - m. Critical thinking
 - n. Dependability
 - o. Accountability
 - p. Open to constructive feedback
2. Discuss professionalism.
3. Apply job-seeking skills.
 - a. Prepare a resume
 - b. Write a cover letter
 - c. Practice job interviewing skills
 - d. Write a follow-up letter or email
4. Identify job opportunities available for Medical Assistants.
 - a. Ambulatory setting
 - b. Healthcare departments and specialties

Objective 3 Describe other healthcare professionals with whom medical assistants will work.

1. Categorize medical practice specialties. (Examples could include orthopedics, gastroenterology, anesthesiology, etc.)
2. Identify ancillary healthcare departments. (Examples could include pharmacy, radiology, laboratory, etc.)

Standard 1 Performance Evaluation included below (Optional)

Standard 2

Students will analyze the legal and ethical issues that impact the medical office.

Objective 1 Identify the legal guidelines/requirements for a medical office.

1. Define a medical assistant's scope of practice and understand the principle of delegation.
2. Apply risk management procedures.
3. Define Health Information Portability and Accountability Act (HIPAA) regulations for the medical office.
 - a. Discuss patient self-determination acts.
 - i. Medical (Durable) Power of Attorney
 - ii. Living will/Advanced directives
 - iii. Anatomical Gift Act (Organ donation)

Objective 2 Define classifications of law.

1. Discuss criminal law.
2. Discuss civil law.
3. Torts
 - a. Battery
 - b. Assault
 - c. Libel
 - d. Slander
 - e. False imprisonment
 - f. Defamation
 - g. Invasion of privacy
4. Contracts

Objective 3 Explain malpractice and the terms associated with malpractice litigation.

1. Compare and contrast negligence and malpractice.
2. Identify malpractice terms.
 - a. Informed consent
 - b. Patient rights
 - c. Good Samaritan Law
 - d. Statute of Limitations
 - e. Commission and Omission

Objective 4 Evaluate medical ethics and related issues.

1. Differentiate between law, etiquette, and ethics.
2. Discuss ethical situations.
3. Apply ethical situations in personal and professional practice.

Standard 3

Students will identify procedures that contribute to a professional and safe medical office environment.

Objective 1 Identify the elements important in the medical office.

1. Discuss the environment appropriate to maintain comfort for patients.
 - a. Aesthetics

- b. Temperature
 - c. Cleanliness
 - d. Compliance with Americans with Disabilities Act (ADA)
- 2. Describe the professional way of greeting and responding to patients.
 - a. Explain the process of collecting new and updated information from patients.
 - b. Describe the professional way of escorting and instructing patients.
- 3. Learn general techniques of how to resolve conflicts with patients.
 - a. Late appointment
 - b. Angry patient
 - c. Talkative patient
 - d. Missed appointment

Objective 2 Identify the duties of opening and closing the office.

- 1. Discuss steps used in opening the medical office.
- 2. Discuss steps used in closing the medical office.

Standard 3 Performance Evaluation included below (Optional)

Standard 4

Students will apply effective medical office communication principles in the healthcare setting.

Objective 1 Describe general guidelines for telephone communication.

- 1. Describe the medical assistant's role in the triage of telephone calls.
- 2. Explain the importance of documenting telephone calls.
- 3. Demonstrate professionalism when answering telephone calls.
- 4. Identify the process of obtaining and making referrals.
- 5. Discuss the process of calling in prescription refills.

Objective 2 Describe general guidelines for electronic communication (emails, text reminders, patient portals, telehealth, etc.)

- 1. Describe the medical assistant's role in electronic communications.
- 2. Demonstrate professionalism when utilizing electronic communication tools.

Objective 3 Describe scheduling techniques.

- 1. Utilize a matrix/master schedule.
- 2. Describe different types of scheduling.
 - a. Double booking
 - b. Group/Cluster booking
 - c. Open office hours
 - d. Walk-in
 - e. New patient vs. established patient
- 3. Describe how to document a no-show appointment and a cancellation.

Standard 5

Students will apply effective interpersonal communication principles in a healthcare setting.

Objective 1 Differentiate between verbal and nonverbal communication.

1. Describe the importance of body language and gestures during communication.
2. Explain the importance of tone of voice, word choice, and silence during communication.
3. Identify the parts of a communication model.
 - a. Sender
 - b. Receiver
 - c. Message
 - d. Feedback

Objective 2 Identify effective listening skills/habits.

1. Differentiate between active and passive listening.
2. Identify types of questions to elicit patient information.
 - a. Open ended questions
 - b. Restating
 - c. Reflecting
 - d. Clarification
 - e. Leading

Objective 3 Identify communication barriers.

1. Describe the following communication barriers:
 - a. Physical
 - b. Mental
 - c. Language or Cultural
 - d. Maturity
 - e. Age
 - f. Stress
2. Describe the following defense mechanisms.
 - a. Repression
 - b. Regression
 - c. Rationalization
 - d. Sarcasm
 - e. Denial
 - f. Compensation
 - g. Projection
 - h. Displacement
 - i. Physical avoidance
 - j. Apathy

Objective 4 Contrast sympathy and empathy.

Objective 5 Describe the steps of the grieving process.

1. Identify the psychological implications of disease/injury/illness to a patient.
2. Describe the five psychological stages of grieving.
 - a. Denial
 - b. Anger
 - c. Bargaining
 - d. Depression
 - e. Acceptance

Standard 6

Students will accurately maintain medical records.

Objective 1 Identify the contents of a medical record.

1. Discuss the standard medical record and various types of reports.
 - a. Patient's past records
 - b. History and physical
 - c. Insurance
 - d. Office notes
 - e. Progress notes
 - f. Pathology results
 - g. Medication(s) and/or supplements
 - h. Physician orders
 - i. Diagnostic reports
 - j. Laboratory reports
 - k. Operative reports
 - l. Consultation reports
2. Describe common documentation approaches for medical records.
 - a. SOAP - Subjective, Objective, Assessment, Plan
 - b. HPIP - History, Physical, Impression, Plan
 - c. Describe how to initiate a new patient medical record.
 - i. Paper charting
 - ii. Electronic Medical Record (EMR)

Objective 2 Differentiate between subjective and objective information.

Objective 3 Discuss the legalities associated with the medical record.

1. Describe how to correct errors in the patient chart.
2. Describe how to add information or addendums to the patient chart.
3. Explain the importance of documenting all interventions.

Standard 6 Performance Evaluation included below

Standard 7

Students will perform bookkeeping and financial functions in a medical office setting.

Objective 1 Differentiate between accounts receivable and accounts payable.

1. Define bookkeeping terms.
 - a. Credit
 - b. Debit
 - c. Transaction
 - d. Adjustment
 - e. Balance
 - f. Asset
 - g. Liability
 - h. Collections
2. Describe the following financial forms.
 - a. Bank deposit
 - b. Bank statement
 - c. Receipt
 - d. Invoice
 - e. Day sheet

Objective 2 Discuss the difference between various methods of payment.

1. Differentiate between different types of checks.
 - a. Personal
 - b. Third party check (insurance company)
 - c. Electronic checks (electronic funds transfer)
2. Define terms associated with a checking account.
 - a. Payee
 - b. Payer
 - c. Endorsement
3. Describe differences between credit card and debit cards.
4. Compare and contrast flexible spending accounts and health savings accounts.

Standard 7 Performance Evaluation included below

Standard 8

Students will perform proper insurance, coding, and billing procedures.

Objective 1 Identify terms associated with medical insurance.

1. Define the following terms associated with medical billing.
 - a. Birthday rule
 - b. Preauthorization/Precertification
 - c. Premium
 - d. Copayment/Coinsurance
 - e. Deductible
 - f. Explanation of Benefits (EOB)
 - g. Fee Schedule
 - h. Assignment of Benefits
2. Define various insurance carriers.
 - a. Health Maintenance Organizations - HMO
 - b. Preferred Provider Organizations - PPO
 - c. Medicare
 - d. Medicaid
 - e. Fee for Service
 - f. Tricare (military and dependents)
 - g. Workers Compensation
 - h. Affordable Care Act (ACA)
3. Explain the process to prepare a healthcare claim (CMS 1500 form).

Objective 2 Explain how to determine procedural and diagnostic coding.

1. Define the following terms associated with medical coding.
 - a. CPT codes
 - b. ICD-10 codes
 - c. HCPCS codes
 - d. CMS 1500 form

2. Explain the legalities associated with coding and billing in a medical office including fraudulent claims.
 - a. Upcoding
 - b. Unbundling

Standard 8 Performance Evaluation included below

Medical Assistant: Medical Office Management

Performance assessments may be completed and evaluated at any time during the course. The following performance skills are to be used in connection with the associated standards and exam. To pass the performance standard the student must attain a performance standard average of 8 or higher on the rating scale. Students may be encouraged to repeat the objectives until they average 8 or higher.

Student's Name: _____

Class: _____

Performance standards rating scale

0	Limited skills	2	→	4	Moderate skills	6	→	8	High skills	10
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Standard 3 – Patient Reception

Score:

- Collation of patient records.
- Opening the office and closing the office.
- Greeting the patient, responding to the patient, escorting and instructing the patient.

Standard 4 – Oral Communication

Score:

- Demonstrate methods of receiving, placing, and recording calls.
- Answer the office telephone.
- Receive, evaluate, and record a phone message.
- Make referrals by phone, and schedule appointments by phone.

Standard 6 – Medical Records

Score:

- Demonstrate filing: alphabetically and numerically.

Standard 7 – Office Finance

Score:

- Prepare a bank deposit.
- Post a payment to a patient account.
- Enter patient account information.

Standard 5 – Insurance

Score:

- Complete a CMS 1500 insurance claim form.

Performance standard average score:

Evaluator Name: _____

Evaluator Title: _____

Evaluator Signature: _____

Date: _____