



Western Technical College

31509301 Medical Asst Admin Procedures

Course Outcome Summary

Course Information

Description	Introduces medical assistant students to office management, business administration, and the electronic medical record (EMR) in the medical office. Students learn to schedule appointments, perform filing, record keeping, telephone and reception duties, communicate effectively with patients and other medical office staff, and keep an inventory of supplies.
Career Cluster	Health Science
Instructional Level	Technical Diploma Courses
Total Credits	2
Total Hours	72

Textbooks

Today's Medical Assistant: Clinical and Administrative Procedures. 4th Edition. Copyright 2020. Bonewit-West, Kathy, Sue Hunt, and Edith Applegate. Publisher: Elsevier Science. **ISBN-13:** 978-0-323-58127-1. Required. (Part of Western Bundle Package **ISBN-13:** 978-0-323-79964-5)

Today's Medical Assistant: Clinical and Administrative Procedures – Study Guide. 4th Edition. Copyright 2020. Bonewit-West, Kathy, Sue Hunt, and Edith Applegate. Publisher: Elsevier Science. **ISBN-13:** 978-0-323-63986-6. Required. (Part of Western Bundle Package **ISBN-13:** 978-0-323-79964-5)

Evolve Resources with TEACH IRM for Today's Medical Assistant. 4th Edition. Copyright 2020. Bonewit-West, Kathy, Sue Hunt, and Edith Applegate. Publisher: Elsevier Science. **ISBN-13:** 978-0-323-63985-9. Required. (Part of Western Bundle Package **ISBN-13:** 978-0-323-79964-5)

SimChart for the Medical Office – Access. Copyright 2014. Publisher: Elsevier Science. **ISBN-13:** 978-0-323-24195-3. Required.

Learner Supplies

\$10.00 for copies. **Vendor:** To be discussed in class. Required.

Success Abilities

1. Refine Professionalism: Practice Effective Communication

Program Outcomes

1. Perform medical office administrative functions

Course Competencies

1. Explain general office policies

Assessment Strategies

- 1.1. in a role play or simulation

Criteria

Your performance will be successful when:

- 1.1. your response summarizes general office policies
- 1.2. your response addresses the legal implications associated with confidentiality of patient and medical records
- 1.3. your response addresses how confidentiality is maintained with the use of computerized medical records
- 1.4. your response uses correct medical terminology
- 1.5. your response is clear
- 1.6. you coach patients regarding: office policies.
- 1.7. you explain the Medical Assistant Scope of Practice

Learning Objectives

- 1.a. Linked external target standards are the learning objectives.

2. Demonstrate telephone techniques

Assessment Strategies

- 2.1. in a written, oral or case study response
- 2.2. in a simulation

Criteria

Your performance will be successful when:

- 2.1. you discuss the correct technique (e.g. including proper etiquette) to use when answering the telephone for a medical practice
- 2.2. you discuss how the use of the telephone can affect the image of the medical practice
- 2.3. you discuss the use of "hold" with several incoming calls
- 2.4. you discuss taking a message from a patient and correctly documenting the information
- 2.5. you discuss 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
- 2.6. you explain how a breach of patient confidentiality can be avoided when using the telephone
- 2.7. you describe the role of answering machines, answering services, pagers, and electronic mail in the medical office
- 2.8. you demonstrate professional telephone techniques
- 2.9. you document telephone messages accurately

Learning Objectives

2.a. Linked external target standards are the learning objectives.

3. Manage appointment schedule, using established priorities

Assessment Strategies

- 3.1. in a written or oral response
- 3.2. using an appointment book or appointment management software
- 3.3. in a simulation

Criteria

Your performance will be successful when:

- 3.1. you identify different types of appointment scheduling methods
- 3.2. you identify critical information required for scheduling patient admissions and/or procedures
- 3.3. you input patient data utilizing a practice management system
- 3.4. you manage appointment schedule using established priorities
- 3.5. you assess simulated phone calls to determine scheduling priorities
- 3.6. you schedule patient admissions and/or procedures
- 3.7. you document scheduling changes in the correct location
- 3.8. you include documentation of the status of the appointment: late, no show, rescheduled or cancelled
- 3.9. you recognize office policies and protocols for handling appointments
- 3.10. you implement time management principles to maintain effective office function

Learning Objectives

3.a. Linked external target standards are the learning objectives.

4. Explain principles related to medical records

Assessment Strategies

- 4.1. in a written exam

Criteria

Your performance will be successful when:

- 4.1. you identify types of records common to the healthcare setting
- 4.2. you describe various types of content maintained in a patient's medical record
- 4.3. you define the differences between the components of the medical record
- 4.4. you differentiate between active, inactive, and closed files
- 4.5. you specify the requirements for the retention of medical and business records in the medical office
- 4.6. you compare and contrast electronic and hard copy medical record systems
- 4.7. you differentiate between electronic medical records (EMR) and a practice management system
- 4.8. you explain why the physician is the legal owner of a patient's medical record
- 4.9. you discuss how to protect patient confidentiality

Learning Objectives

4.a. Linked external target standards are the learning objectives.

5. Utilize electronic medical record (EMR)

Assessment Strategies

- 5.1. In a performance demonstration

Criteria

Your performance will be successful when:

- 5.1. you register a new patient in the EMR
- 5.2. you document patient information in the EMR
- 5.3. you utilize the EMR to access information
- 5.4. you protect the integrity of the medical record using the EMR

Learning Objectives

5.a. Linked external target standards are the learning objectives.

6. Perform an office inventory

Assessment Strategies

- 6.1. in a written or oral response
- 6.2. in a simulation

Criteria

Your performance will be successful when:

- 6.1. you list steps involved in completing an inventory
- 6.2. you perform an inventory with documentation
- 6.3. you describe how a spreadsheet is used to track supplies in a medical practice
- 6.4. you describe how to verify the receipt of a shipment of supplies with the purchase order against the packing slip
- 6.5. you discuss the importance stock numbers, descriptions, quantity, and unit price

Learning Objectives

- 6.a. Linked external target standards are the learning objectives.

7. Perform routine maintenance of office equipment with documentation

Assessment Strategies

- 7.1. in a written or oral response
- 7.2. in a simulation

Criteria

- 7.1. you complete an equipment maintenance and servicing log
- 7.2. you discuss the importance of routine maintenance of office equipment
- 7.3. you identify troubleshooting options for equipment that is not operating properly
- 7.4. you describe the procedure to be followed when equipment is not functioning properly

Learning Objectives

- 7.a. Linked external target standards are the learning objectives.

8. Compose professional/business letters

Assessment Strategies

- 8.1. in the production of written documents including business letters, memos, resumes, cover letters, messages, faxes, and/or charts
- 8.2. using a computer, fax machine, scanner and/or other common medical office equipment
- 8.3. in written exam
- 8.4. in a simulation

Criteria

Your performance will be successful when:

- 8.1. you describe how to file document copies according to established procedures
- 8.2. you recognize elements of fundamental writing skills
- 8.3. you discuss applications of electronic technology in professional communication
- 8.4. you respond to and initiate written communication as needed for the medical office
- 8.5. you compose professional correspondence utilizing electronic technology
- 8.6. you proofread and edit documents before distribution
- 8.7. you format document correctly according to established guidelines
- 8.8. you use correct grammar and spelling
- 8.9. you address an envelope according to postal OCR guidelines

Learning Objectives

- 8.a. Linked external target standards are the learning objectives.

9. Integrate principles of customer service in the healthcare setting

Assessment Strategies

- 9.1. by analyzing scenarios
- 9.2. in a simulated health care setting
- 9.3. using resources/references

Criteria

Performance will be successful when:

- 9.1. you identify both internal and external healthcare customers
- 9.2. you focus on effective customer communication
- 9.3. you determine responsive methods to identify and meet customer needs
- 9.4. you determine effective customer follow-up procedures
- 9.5. you identify cultural health beliefs and design effective methods to meet the needs of the diverse customer

Learning Objectives

- 9.a. Linked external target standards are the learning objectives.

10. Develop a current list of community resources related to patients' healthcare needs

Assessment Strategies

- 10.1. by identifying and documenting community resources

Criteria

Your performance will be successful when:

- 10.1. resource documentation includes a variety of service agencies
- 10.2. resources includes contact information
- 10.3. resource documentation includes methods of making referrals to resources
- 10.4. you recognize the role of patient advocacy in the practice of medical assisting
- 10.5. you advocate on behalf of patients

Learning Objectives

- 10.a. Linked external target standards are the learning objectives.