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


Learner Supplies

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

Success Abilities

1. Cultivate Passion: Enhance Personal Connections
2. Cultivate Passion: Expand a Growth-Mindset
3. Cultivate Passion: Increase Self-Awareness
4. Live Responsibly: Develop Resilience
5. Live Responsibly: Embrace Sustainability
6. Live Responsibly: Foster Accountability
7. Refine Professionalism: Act Ethically
8. Refine Professionalism: Improve Critical Thinking
9. Refine Professionalism: Participate Collaboratively
10. Refine Professionalism: Practice Effective Communication

Program Outcomes
1. Perform medical office administrative functions
2. Provide patient care in accordance with regulations, policies, laws, and patient rights
3. Demonstrate professionalism in a healthcare setting
4. Demonstrate safety and emergency practices in a healthcare setting

Course Competencies

1. **Explain general office policies.**
   
   Assessment Strategies
   1.1. in a role play or simulation
   
   Criteria

   *You will know you are successful when:*
   1.1. you summarize general office policies.
   1.2. you address the legal implications associated with confidentiality of patient and medical records.
   1.3. you address how confidentiality is maintained with the use of computerized medical records.
   1.4. you use correct medical terminology.
   1.5. you are clear in your response.
   1.6. you coach patients regarding: office policies.

   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

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

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
You will know you are 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 explain the term “routing” as it pertains to the medical record
4.5. you describe the difference between source-oriented and problem-oriented medical records
4.6. you identify methods of organizing the patient’s medical record based on: problem-oriented medical record (POMR)
4.7. you identify methods of organizing the patient’s medical record based on: source-oriented medical record (SOMR)
4.8. you differentiate between active, inactive, and closed files
4.9. you specify the requirements for the retention of medical and business records in the medical office
4.10. you compare and contrast electronic and hard copy medical record systems
4.11. you differentiate between electronic medical records (EMR) and a practice management system
4.12. you explain meaningful use as it applies to EMR
4.13. you explain why the physician is the legal owner of a patient’s medical record
4.14. you discuss how to protect patient confidentiality

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

5. Maintain medical records.

Assessment Strategies
5.1. in a simulation
5.2. in a written exam
Criteria

You will know you are successful when:

5.1. you describe indexing rules
5.2. you describe the use of an out guide folder
5.3. you identify systems for organizing medical records
5.4. you discuss pros and cons of various filing methods
5.5. you identify equipment and supplies needed for creating, maintaining, and storing medical records
5.6. you discuss filing procedures
5.7. you consider staff needs and limitations in establishment of a filing system
5.8. you arrange a group of charts in numerical order
5.9. you create a patient's medical record
5.10. you apply indexing rules when preparing labels for charts
5.11. you maintain organization by filing (e.g. medical records, business documents)
5.12. you organize technical information and summaries in a patient's medical record

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

6. **Utilize electronic medical record (EMR).**

Assessment Strategies
6.1. In a performance demonstration

Criteria

You will know you are successful when:

6.1. you register a new patient in the EMR
6.2. you document patient information in the EMR
6.3. you utilize the EMR to access information
6.4. you protect the integrity of the medical record using the EMR

Learning Objectives
6.a. Linked external target standards are the learning objectives.

7. **Perform an office inventory.**

Assessment Strategies
7.1. in a written or oral response
7.2. in a simulation

Criteria

You will know you are successful when:

7.1. you list steps involved in completing an inventory
7.2. you perform an inventory with documentation
7.3. you describe how a spreadsheet is used to track supplies in a medical practice
7.4. you describe how to verify the receipt of a shipment of supplies with the purchase order against the packing slip
7.5. you discuss the importance stock numbers, descriptions, quantity, and unit price
7.6. you complete purchase order for needed supplies
7.7. you use the internet or supplier catalogs

Learning Objectives
7.a. Linked external target standards are the learning objectives.

8. **Perform routine maintenance of office equipment with documentation.**

Assessment Strategies
8.1. in a written or oral response
8.2. in a simulation

Criteria

You will know you are successful when:
8.1. you describe how a spreadsheet is used to track equipment maintenance and servicing
8.2. you discuss the importance of routine maintenance of office equipment
8.3. you describe troubleshooting techniques for equipment that is not operating properly
8.4. you describe the procedure to be followed when equipment is not functioning properly
8.5. you perform routine maintenance and document the maintenance procedure performed for a piece of
   equipment in the administrative and/or clinical area

Learning Objectives
8.a. Linked external target standards are the learning objectives.

9. **Compose professional/business letters.**

**Assessment Strategies**
9.1. in the production of written documents including business letters, memos, resumes, cover letters,
   messages, faxes, and/or charts
9.2. using a computer, fax machine, scanner and/or other common medical office equipment
9.3. in written exam
9.4. in a simulation

**Criteria**

*You will know you are successful when:*
9.1. you describe how to file document copies according to established procedures
9.2. you recognize elements of fundamental writing skills
9.3. you discuss applications of electronic technology in professional communication
9.4. you respond to and initiate written communication as needed for the medical office
9.5. you compose professional correspondence utilizing electronic technology
9.6. you proofread and edit documents before distribution
9.7. you format document correctly according to established guidelines
9.8. you use correct grammar and spelling
9.9. you address an envelope according to postal OCR guidelines

Learning Objectives
9.a. Linked external target standards are the learning objectives.

10. **Integrate principles of customer service in the healthcare setting.**

**Assessment Strategies**
10.1. by analyzing scenarios
10.2. in a simulated health care setting
10.3. using resources/references

**Criteria**

*You will know you are successful when:*
10.1. you identify both internal and external healthcare customers
10.2. you focus on effective customer communication
10.3. you determine responsive methods to identify and meet customer needs
10.4. you determine effective customer follow-up procedures
10.5. you identify cultural health beliefs and design effective methods to meet the needs of the diverse customer

Learning Objectives
10.a. Linked external target standards are the learning objectives.