



**MEDICAL ASSISTING:  
ADMINISTRATIVE**

**OD28624**

**ALIGNED WITH AMT ADMINISTRATIVE SPECIALIST**

**ENDORSED BY INTEGRIS PHYSICIANS SERVICES**

## ***COMPETENCY-BASED EDUCATION: OKLAHOMA'S RECIPE FOR SUCCESS***

### ***BY THE INDUSTRY FOR THE INDUSTRY***

Oklahoma's *CareerTech* system of competency-based education uses industry professionals and certification standards to identify the knowledge and abilities needed to master an occupation. This industry input provides the foundation for development of instructional materials that help prepare the comprehensively trained, highly skilled employees demanded by our workplace partners.

### ***TOOLS FOR SUCCESS***

*CareerTech* relies on three basic instructional components to deliver competency-based instruction: skills standards, curriculum materials, and competency assessments.

**Skills standards** provide the foundation for competency-based instruction in Oklahoma's *CareerTech* system. The skills standards outline the knowledge, skills, and abilities needed to perform related jobs within an industry. Skills standards are aligned with national skills standards; therefore, a student trained to the skills standards possesses technical skills that make him/her employable in both state and national job markets.

**Curriculum materials** contain information and activities that teach students the knowledge and skills outlined in the skills standards. In addition to complementing classroom instruction, curriculum resources provide supplemental activities to enhance learning and provide hands-on training experiences.

**Competency Assessments** test the student over material outlined in the skills standards and taught using the curriculum materials. When used with classroom performance evaluations, written competency assessments provide a means of measuring occupational readiness.

Although each of these components satisfy a unique purpose in competency-based education, they work together to reinforce the skills and abilities students need to gain employment and succeed on the job.

### ***MEASURING SUCCESS***

Written competency assessments are used to evaluate student performance. Results reports communicate competency assessment scores to students and provide a breakdown of assessment results by duty area. The results breakdown shows how well the student has mastered skills needed to perform major job functions and identifies areas of job responsibility that may require additional instruction and/or training.

Group analysis of student results also provides feedback to instructors seeking to improve the effectiveness of career and technology training. Performance patterns in individual duties indicate opportunities to evaluate training methods and customize instruction.

### ***TRUE TO OUR PURPOSE***

"Helping Oklahomans succeed in the workplace" defines the mission of Oklahoma *CareerTech* and its competency-based system of instruction. Skills standards, curriculum, and assessments that identify and reinforce industry expectations provide accountability for programs and assure *CareerTech*'s continued role in preparing skilled workers for a global job market

Copyright 2009

Oklahoma Department of Career and Technology Education  
All rights reserved

Printed in the United States of America by the  
Oklahoma Department of Career and Technology Education  
Stillwater, Oklahoma

**The Oklahoma Department of Career and Technology Education does not discriminate on the basis of race, creed, color, national origin, sex, age, veteran status, or qualified handicap**

**MEDICAL ASSISTING –  
ADMINISTRATIVE  
SKILLS STANDARDS  
Frequency and Criticality Ratings**

Duty A: Medical Assisting Foundations

Duty B: Basic Clinical Medical Office Assisting

Duty C: Medical Office Clerical Assisting

Duty D: Medical Records Management

Duty E: Health Care Insurance Processing, Coding, and Billing

Duty F: Medical Office Financial Management

Duty G: Medical Office Information Processing

Duty H: Medical Office Management

**Frequency:** represents how often the task is performed on the job. Frequency rating scales vary for different occupations. The rating scale used in this publication is presented below:

- 1 = less than once a week
- 2 = at least once a week
- 3 = once or more a day

**Criticality:** denotes the level of consequence associated with performing a task incorrectly. The rating scale used in this publication is presented below:

- 1 = slight
- 2 = moderate
- 3 = extreme

**DUTY A: Medical Assisting Foundations**

CODE	TASK	F/C
A.01	Medical terminology <ul style="list-style-type: none"> <li>• Use and spell basic medical terms appropriately</li> <li>• Identify root words, prefixes, and suffixes</li> <li>• Define basic medical terms</li> </ul>	
A.02	Anatomy and physiology <ul style="list-style-type: none"> <li>• Know basic structures and functions of body systems</li> <li>• Know various disorders of the body (diseases, conditions, syndromes)</li> </ul>	
A.03	Legal and ethical considerations <ul style="list-style-type: none"> <li>• Apply principles of medical law and ethics to the health care setting</li> <li>• Recognize legal responsibilities of, and know scope of practice for the medical administrative specialist</li> <li>• Know basic laws pertaining to medical practice</li> <li>• Know and observe disclosure laws (patient privacy, minors, confidentiality, HIPPA)</li> <li>• Know the principles of medical ethics established by the AMA</li> <li>• Recognize unethical practices and identify ethical responses for situations in the medical office</li> </ul>	

A.04	Professionalism <ul style="list-style-type: none"> <li>• Employ human relations skills appropriate to the health care setting</li> <li>• Display behaviors of a professional medical administrative specialist</li> <li>• Participate in appropriate continuing education</li> </ul>	
------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

**Duty B: Basic Clinical Medical Office Assisting**

CODE	TASK	F/C
B.01	Basic health history interview <ul style="list-style-type: none"> <li>• Obtain preliminary health histories from patients</li> </ul>	
B.02	Basic charting <ul style="list-style-type: none"> <li>• Chart patient information</li> </ul>	
B.03	Vital signs and measurements <ul style="list-style-type: none"> <li>• Measure vital signs (temperature, pulse, respiration, and blood pressure)</li> <li>• Obtain other vital measurements (weight, height)</li> </ul>	
B.04	Asepsis in the medical office <ul style="list-style-type: none"> <li>• Understand concepts of asepsis, sanitization, disinfection, and sterilization</li> <li>• Understand prevention of disease transmission</li> <li>• Observe standard precautions</li> </ul>	
B.05	Examination preparation <ul style="list-style-type: none"> <li>• Prepare patients for clinical examinations</li> </ul>	
B.06	Medical office emergencies <ul style="list-style-type: none"> <li>• Recognize and respond to medical emergencies</li> <li>• Employ First Aid and CPR appropriately</li> <li>• Report emergencies as required by law</li> </ul>	
B.07	Pharmacology <ul style="list-style-type: none"> <li>• Understand basic pharmacological concepts and terminology</li> </ul>	

**DUTY C: Medical Office Clerical Assisting**

CODE	TASK	F/C
C.01	Appointment management and scheduling <ul style="list-style-type: none"> <li>• Schedule and monitor patient and visitor appointments</li> <li>• Address cancellations and missed appointments</li> <li>• Prepare information for referrals and preauthorizations</li> <li>• Arrange hospital admissions and surgery, and schedule patients for out-patient diagnostic tests</li> <li>• Manage recall system and file</li> </ul>	
C.02	Reception <ul style="list-style-type: none"> <li>• Receive and process patients and visitors</li> <li>• Screen visitors and vendors requesting to see physician</li> <li>• Coordinate patient flow into examining rooms</li> </ul>	
C.03	Communication <ul style="list-style-type: none"> <li>• Employ effective written and oral communication</li> <li>• Address and process incoming telephone calls from outside providers, pharmacies, and vendors</li> <li>• Employ appropriate telephone etiquette when screening patient calls and addressing office business</li> <li>• Recognize, and employ proper protocols for telephone emergencies</li> </ul>	

	<ul style="list-style-type: none"> <li>• Format business documents and correspondence appropriately</li> <li>• Process incoming and outgoing mail</li> </ul>	
C.04	Patient information and community resources <ul style="list-style-type: none"> <li>• Order and organize patient informational materials</li> <li>• Maintain list of community referral resources</li> </ul>	

**Duty D: Medical Records Management**

CODE	TASK	F/C
D.01	Systems <ul style="list-style-type: none"> <li>• Demonstrate knowledge of, and manage patient medical records systems</li> <li>• Manage documents and patient charts using paper methods</li> <li>• Manage documents and patient charts using computerized methods</li> </ul>	
D.02	Procedures <ul style="list-style-type: none"> <li>• File records alphabetically, numerically, by subject, and by color</li> <li>• Employ rules of indexing</li> <li>• Arrange contents of patient charts in appropriate order</li> <li>• Document and file laboratory results and patient communication in charts</li> <li>• Perform corrections and additions to records</li> <li>• Store, protect, retain, and destroy records appropriately</li> <li>• Transfer files</li> <li>• Perform daily chart management</li> <li>• Prepare charts for external review and audits</li> </ul>	
D.03	Confidentiality <ul style="list-style-type: none"> <li>• Observe and maintain confidentiality of records, charts, and test results</li> <li>• Observe special regulations regarding the confidentiality of protected information</li> </ul>	

**Duty E: Health Care Insurance Processing, Coding, and Billing**

CODE	TASK	F/C
E.01	Insurance processing <ul style="list-style-type: none"> <li>• Understand private/commercial health care insurance plans (PPO, HMO, traditional indemnity)</li> <li>• Understand government health care insurance plans (Medicare, Medicaid, Veteran's Administration, CHAMPUS, Tricare, use of Advance Beneficiary Notices)</li> <li>• Process patient claims using appropriate forms (including superbills) and time frames</li> <li>• Process Workers' Compensation/disability reports and forms</li> <li>• Submit claims for third-party reimbursements including the use of electronic transmission methods</li> </ul>	
E.02	Coding <ul style="list-style-type: none"> <li>• Understand procedure and diagnosis coding</li> <li>• Employ Current Procedural Terminology (CPT) and Evaluation and Management codes appropriately</li> <li>• Employ International Classification of Diseases 9 (ICD9) codes appropriately</li> <li>• Employ Health Care Financing Administration Common Procedure Coding System (HCPCS) codes appropriately</li> </ul>	

E.03	Insurance billing and finances <ul style="list-style-type: none"> <li>• Understand health care insurance terminology (deductible, copayment, preauthorization, capitation, coinsurance)</li> <li>• Understand billing requirements for health care insurance plans</li> <li>• Process insurance payments</li> <li>• Track unpaid claims, and file and track appeals</li> <li>• Understand fraud and abuse regulations</li> </ul>	
------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

**Duty F: Medical Office Financial Management**

CODE	TASK	F/C
F.01	Fundamental financial management <ul style="list-style-type: none"> <li>• Understand basic principles of accounting</li> <li>• Perform bookkeeping procedures including balancing accounts</li> <li>• Perform financial computations</li> <li>• Manage accounts payable</li> <li>• Manage accounts receivable</li> <li>• Prepare monthly trial balance (reports)</li> <li>• Understand basic audit controls</li> <li>• Understand professional fee structures</li> <li>• Understand physician/practice owner compensation provisions</li> <li>• Understand credit arrangements</li> <li>• Manage other financial aspects of office management</li> </ul>	
F.02	Patient accounts <ul style="list-style-type: none"> <li>• Manage patient accounts/ledgers</li> <li>• Manage patient billing (methods, cycle billing procedures)</li> <li>• Manage collections in compliance with state and federal regulations</li> </ul>	
F.03	Banking <ul style="list-style-type: none"> <li>• Understand banking services and procedures (accounts, lines of credit, checking endorsements, deposits, reconciliation, and statements)</li> <li>• Manage petty cash</li> </ul>	
F.04	Payroll <ul style="list-style-type: none"> <li>• Prepare employee payroll and reports</li> <li>• Maintain payroll tax deduction procedures and records</li> </ul>	

**Duty G: Medical Office Information Processing**

CODE	TASK	F/C
G.01	Fundamentals of computing <ul style="list-style-type: none"> <li>• Possess fundamental knowledge of computing in the medical office including keyboarding, data entry, and retrieval</li> <li>• Possess fundamental knowledge of PC-based environment</li> <li>• Possess fundamental knowledge of word processing, spreadsheet, database, and presentation graphics applications</li> <li>• Employ procedures for ensuring the integrity and confidentiality of computer-stored information</li> </ul>	
G.02	Medical office computer applications <ul style="list-style-type: none"> <li>• Employ medical office software applications</li> <li>• Use computer for billing and financial transactions</li> <li>• Employ e-mail applications</li> </ul>	

### Duty H: Medical Office Management

CODE	TASK	F/C
H.01	Office communications <ul style="list-style-type: none"> <li>• Facilitate staff meetings and in-service, and ensure communication of essential information to staff</li> </ul>	
H.02	Business organization management <ul style="list-style-type: none"> <li>• Manage medical office business functions</li> <li>• Manage office mailing and shipping services</li> <li>• Manage outside vendors and supplies</li> <li>• Manage contracts and relationships with associated health care providers</li> <li>• Comply with licensure and accreditation requirements</li> </ul>	
H.03	Human resources <ul style="list-style-type: none"> <li>• Manage/supervise medical office staff</li> <li>• Conduct performance reviews and disciplinary action</li> <li>• Maintain office policy manual</li> <li>• Manage staff payroll and scheduling</li> <li>• Manage staff recruiting in compliance with state and federal laws</li> <li>• Orient and train new staff</li> <li>• Manage employee benefits</li> </ul>	
H.04	Safety <ul style="list-style-type: none"> <li>• Maintain office safety, maintain office safety manual, and post emergency instructions</li> <li>• Observe emergency safety requirements</li> <li>• Maintain records of biohazardous waste, hazardous chemicals (Material Safety Data Sheets), and safety conditions</li> <li>• Comply with Occupational Safety and Health Act (OSHA) guidelines and regulations</li> </ul>	
H.05	Supplies and Equipment <ul style="list-style-type: none"> <li>• Manage medical and office supply inventories and order supplies</li> <li>• Maintain office equipment and arrange for (and maintain records of) equipment maintenance and repair</li> </ul>	
H.06	Physical Office Plant <ul style="list-style-type: none"> <li>• Maintain office facilities and environment</li> </ul>	
H.07	Risk Management and Quality Assurance <ul style="list-style-type: none"> <li>• Understand and employ risk management and quality assurance concepts</li> </ul>	