COURSE SYLLABUS

Spring Semester

NAME OF COURSE:  MA 206  MEDICAL OFFICE ADMINISTRATION II

CREDITS:  2 Credits

INSTRUCTOR:  Terry LeClair, MA
Tammy Clark CMA

METHODOLOGY:  Lecture with Demonstration

COURSE DESCRIPTION:  Prerequisite:  MA 106.
This course contains the second phase of basic medical office administration procedures. Emphasis is on records management, ICD/CPT insurance coding, insurance form preparation, billing and collection procedures, inventory of supplies and equipment, routine maintenance of office equipment, physical plant maintenance, accounts receivable and payable, banking and payroll. The course concludes with job search techniques.

TEXTBOOKS:


COURSE OBJECTIVES:

1. Identify the records that should be gathered in preparation for the patient’s visit.
2. Identify the purpose of medical filing and define medical filing terminology.
3. Demonstrate the ability to file medical records according to alphabetic, numeric, terminal digit, cross-reference and color code filing methods.
4. Identify the purpose of various kinds of medical filing equipment.
5. Demonstrate an understanding of the purpose of preventive recall methods.
6. Describe the use of the CPT and ICD-9 codes in filing claims.
7. Demonstrate ability to use CPT and ICD-9 Code Manuals.
8. Demonstrate the ability to complete insurance forms.
9. Demonstrate knowledge of insurance terminology.
10. Develop an understanding of the role of the medical assistant in maintaining accounts receivable and accounts payable.
11. Demonstrate ability to manage accounts receivable and accounts payable bookkeeping in the medical office.
12. Describe payment and collection plans in the medical office.
13. Describe methods for maintaining inventory records in the medical office.
14. Demonstrate ability to manage inventory systems.
15. Demonstrate ability to order and stock inventory in the medical office.
16. Demonstrate ability to maintain and evaluate equipment.
17. Demonstrate ability to make recommendations for adding and upgrading equipment.
18. Demonstrate ability to maintain payroll records.
19. Demonstrate ability to maintain banking records.
20. Define Classified Abbreviations.
21. Develop an understanding of the concepts involved in the job search process.
22. Describe the necessary parts to a resume.
23. Demonstrate ability to develop a personal resume.
24. Demonstrate ability to complete an application for employment.
25. Demonstrate ability to compose a cover letter, a follow-up letter, and a letter of resignation.
26. Demonstrate knowledge of interviewing skills by participating in a mock interview.

**COURSE CONTENT:**

*Maintaining Patient Records*
Booth, et. al, Chapter 9, Text

*Managing the Office Medical Record*
Booth, et. al, Chapter 10, Text

Medical Filing
Handouts

*Managing Office Supplies*
Booth, et. al, Chapter 8, Text

*Medical Insurance Coding*

*Medical Coding*
Booth, et.al, Chapter 16, Text

*Processing Health-Care Claims*
Booth, et. al, Chapter 15, Text

*Billing and Collections*
Booth, et. al, Chapter 17, Text

*Accounting for the Medical Office*
Booth, et. al, Chapter 18, Text

*Using and Maintaining Medical Equipment*
Booth et. al, Chapter 5, Text
Resume Preparation
Search for a Job?

Job Search Letter Writing
Search for a Job?

Application For Employment Process
Search for a Job?

The Interview Process
Search for a Job?

CONCEPTS OF EFFECTIVE COMMUNICATION
Advocate of behalf of patients

ADMINISTRATIVE FUNCTIONS:

Organize a patient’s medical record
File medical records
Use internet to access information related to the medical office
Maintain organization by filing
Perform routine maintenance of office equipment with documentation
Perform an office inventory
Consider staff needs and limitations in establishment of a filing system
Implement time management principles to maintain effective office function

BASIC PRACTICE FINANCES;

Prepare a bank deposit
Perform collection procedures
Post non-sufficient fund (NSF) checks
Post collection agency payments
Demonstrate sensitivity and professionalism in handling accounts receivable activities with clients

MANAGED CARE/INSURANCE:

Apply both managed care policies and procedures
Apply third party guidelines
Complete insurance claim forms
Obtain percertification, including documentation
Verify eligibility for managed care services
Demonstrate assertive communication with managed care and/or insurance providers
Demonstrate sensitivity in communication with both providers and patients
Communicate in language the patient can understand regarding managed care and insurance plans

PROCEDURAL AND DIAGNOSTIC CODING:

Perform procedural coding
Perform diagnostic coding
Work with physician to achieve the maximum reimbursement
LEGAL IMPLICATIONS
Respond to issues of confidentiality
Apply HIPPA rules in regard to privacy/release of information

ATTENDANCE: Mandatory at all classes.

OUTCOMES MEASUREMENT:
Hour Exams 40%
Homework 20%
Projects 20%
Checklists 10%
Attendance/Class Participation 10%

Passing grade for the course is 76

SPECIAL INSTRUCTIONS: Homework due as announced. Late assignments-5 points deducted per day. Quizzes may be unannounced and occur at any time. Students will have 1 week to make up exams and quizzes.
UNIT 1: MAINTAINING PATIENT RECORDS

GOAL: To familiarize the student with preparation and maintenance of medical records

LEARNING OUTCOMES: The student will demonstrate the ability to:
1. Describe the purposes of compiling patient medical records
2. Identify the forms that initialize a patient record
3. Explain how to create and maintain a patient record
4. Describe the need for neatness, timeliness, accuracy, and professional tone in patient records
5. Explain how to correct a medical record
6. Describe how a medical record may be released
7. Differentiate advantages and disadvantages of the electronic medical record

COURSE CONTENT:

I. Importance of patient records
   A. Legal guidelines for patient records
   B. Additional uses of patient records

II. Contents of patient charts
   A. Standard chart information
      a. patient registration form
      b. patient medical history
      c. physical examination results
      d. results of lab and other tests
      e. records from other physicians or hospitals
      f. doctor’s diagnosis and treatment plan
      g. operative reports, follow up visits and phone calls
      h. informed consent forms
      i. hospital discharge summary forms
      j. correspondence with or about the patient

III. Dating and initialing

IV. Initiating and maintaining patient records
   A. Initial interview
      a. completing medical history forms
      b. documenting patient statements
      c. documenting test results
      d. exam prep and vital signs
   B. Follow up

V. The Six C’s of charting
   A. client’s word
   B. clarity
   C. completeness
   D. conciseness
   E. chronological order
   F. confidentiality

VI. Types of medical records
   A. Conventional, or source-oriented, records
   B. Problem-oriented medical records
      a. database
      b. problem list
      c. educational, diagnostic, and treatment plan
      d. progress notes
   C. SOAP Documentation
      a. subjective
      b. objective
c. assessment
d. plan
D. CHEDDAR format
   a. chief complaint
   b. history
   c. examination
   d. details
   e. drugs and disease
   f. assessment
   g. return
VII. Appearance, Timeliness, and Accuracy of Records
    A. Neatness and Legibility
    B. Timeliness
    C. Accuracy
    D. Professional attitude and tone
VIII. Electronic medical records
    A. Disadvantages
    B. Advantages
    C. Vendors
    D. Security concerns
IV. Correcting and updating patient records
    A. using care with corrections
    B. updating patient records
V. Release of records
    A. Procedures for releasing records
    B. Special cases
    C. Confidentiality

RESOURCES:
   Lecture with demonstration
   Textbook reading assignments
   Chapter review questions-CD

OUTCOMES MEASUREMENTS:
   Textbook review assignments-CD
   Competency checklists
   Chapter test

1.
UNIT2: RECORDS MANAGEMENT IN THE MEDICAL OFFICE

GOAL: Familiarize student with Filing Rules and develop skill in maintaining good records management procedures for the medical office.

LEARNING OBJECTIVES:
1. Demonstrate knowledge of the purpose of medical filing
2. Select equipment and supplies required to maintain a medical filing system.
3. Demonstrate knowledge of and ability to apply filing rules.
4. Demonstrate ability to maintain and retrieve medical records.

COURSE CONTENT:
I. Overview of Medical Filing
   A. Five phases of the medical records life cycle
      1. Creation
      2. Use
      3. Storage
      4. Retrieval
      5. Disposition
II. Records Management Procedures
    A. Rules for Records Protection
    B. Rules for Records Retrieval
III. Filing Equipment
    A. Filing shelves
    B. Filing cabinets
       a. vertical file
       b. lateral file
    C. Compactible files
    D. Rotary circular files
    E. Plastic/cardboard tubs or boxes
    F. Tickler File
IV. Filing Supplies
    A. File folders
       a. tabs
       b. labels
    B. File jackets
    C. File guides
    D. Out guides
    E. File sorters
    F. Binders
    G. Purchasing filing supplies
V. Filing Systems
   A. Alphabetic
   B. Numeric
      a. Terminal Digit
      b. Middle Digit
   C. Color Coding
   D. Computerized
   E. Tickler files
VI. The Filing Process
   A. How to File
A. Inspecting
B. Indexing
C. Coding
D. Sorting
E. Storing
C. Limiting Access to Files
D. Filing Guidelines
E. Locating Misplaced Files
F. Active versus Inactive Files
VII. Inactive and Closed File Storage
   A. Basic Storage Options
      i. Paper storage
      ii. Computer storage
      iii. Microfilm, microfiche, and cartridges
   B. Storage Facilities
   C. Storage Safety
   D. Retaining files in the office

RESOURCES:
   Lecture/demonstration
   Textbook Readings
   Chapter Exercises/CD
   Filing Projects

OUTCOMES MEASUREMENT:
   Filing Projects
   Checklists
   Chapter quizzes
   Chapter Tests
UNIT 3: MANAGEMENT OF HEALTH CARE FORMS

GOAL: Familiarize student with insurance terminology and coding procedures required to submit health insurance forms.

OUTCOMES:
1. Define insurance terminology
2. Gather patient information required for completion of insurance forms.
3. Use coding manuals to locate necessary code for procedure, diagnosis, and/or supplies.
4. Prepare HCFA-1500 health insurance forms
5. Define Medicare, Medicaid, CHAMPUS, and Workmen’s Compensation coverage.
6. Explain managed care

COURSE CONTENT:
I. Gathering patient information
II. Diagnostic coding
   A. ICD-9 Codes
   B. CPT Codes
   C. V Codes
   D. E Codes
III. Using coding manuals
IV. Completing insurance forms
   A. HCFA-1500 form
V. Accounts Receivable Bookkeeping
   A. Equipment and Supplies needed
   B. Pegboard System
   C. Collection and payment policies
VI. Inventory Control and Purchasing
   A. Establishing an inventory system
   B. Maintain an inventory system
   C. Maintaining and evaluating office equipment
   D. Recommending purchases and up-grading of equipment
VII. Accounts Payable Bookkeeping
   A. Payroll
   B. Petty Cash Fund
   C. Banking activities
      1. Checking accounts
      2. Bank reconciliation
RESOURCES:
Lecture with demonstration
Handouts
Textbook reading assignments
Textbook exercises
Computer application exercises

OUTCOMES MEASUREMENT:
Textbook exercises
Computer application exercises
Chapter tests
UNIT 4: ACCOUNTS RECEIVABLE BOOKKEEPING

GOAL: To familiarize student with accounts receivable bookkeeping procedures required in the medical office.

LEARNING OBJECTIVES:
1. Define accounts receivable bookkeeping terminology.
2. Describe the five parts of an accounts payable bookkeeping system.
3. Prepare patient account records, charge slips, walk-out statements, receipts, and management reports.
4. Use a pegboard bookkeeping system
5. Use a computerized bookkeeping system
6. Record payments received through the mail, from insurance carriers, and made by credit card.
7. Record adjustments, discounts, and NSF check.
8. Prepare bank deposit slip

COURSE CONTENT:
I. Overview of accounts receivable bookkeeping system
   A. Patient information required
   B. Practice information required
II. Parts of an accounts receivable bookkeeping system
   A. Patient account records
   B. Charge slips
   C. Receipts and walk-out statements
   D. Management reports
   E. Audit Trail
III. Pegboard bookkeeping system
IV. Posting transactions
   A. Charge codes
   B. Payment codes
   C. Adjustment codes
V. Recording Payments
   A. Received by mail
   B. Received from insurance carriers
   C. Made by credit card
   D. Recording adjustments, write-offs, NSF checks.
   E. Collection agencies
VI. Preparing bank deposit slip

RESOURCES:
Lecture with demonstration
Textbook reading assignments
Textbook/workbook exercises
Forms
Tests

OUTCOMES MEASUREMENT:
Textbook/workbook exercises
Chapter test
UNIT 5: COLLECTION AND PAYMENT PLANS

GOAL: Familiarize student with medical office payment plans, methods of collection, and legal liability.

LEARNING OBJECTIVES:
1. Describe medical office payment plans
2. Explain Federal Truth-in-Lending Law
3. Calculate age of an account
4. Demonstrate making a collection call
5. Describe the use of a collection agency for overdue accounts
6. Describe the use of small claim court for overdue accounts
7. Describe the legal liability of the medical office in the collection of overdue accounts.

COURSE CONTENT:
I. Overview of collection and payment plans
   A. Cash Policy
   B. Cash Discounts
   C. Monthly Statements
   D. Divided Payment Plan
   E. Office Budget Plan
   F. Federal regulations
      1. Truth-in-Lending Agreement
II. Calculating overdue accounts
III. Collection Attempts
    A. Making collection calls
    B. Legal liability
       1. Harassment
       2. Breach of Confidentiality
    C. Collection Letters
    D. Skip Tracing
    E. Collection Agencies
    F. Small Claims Court

RESOURCES:
Lecture with demonstration
Textbook reading assignments
Textbook exercises
Role Playing
Tests

OUTCOMES MEASUREMENT:
Textbook exercises
Chapter test
UNIT 6: INVENTORY CONTROL AND PURCHASING

GOAL: To familiarize student with developing an inventory system and purchasing system for a medical office.

LEARNING OBJECTIVES:
1. Define inventory and purchasing terminology
2. List supplies needed to establish an inventory system
3. Demonstrate determining the reorder point for a supply item.
4. Demonstrate establishing the order quantity for a supply item.
5. Describe how to store administrative and clinical supplies.
6. Identify examples of vital, incidental and periodic supplies used in the medical office

COURSE CONTENT:
I. Organizing Medical Office Supplies
   A. Determining Responsibility for Organizing Supplies
      a. expendable items
      b. durable item
   B. Categorizing Supplies
      a. The supply list
      b. Vital supplies
      c. Incidental supplies
      d. Periodic supplies
   C. Storing Office Supplies
      a. Location
      b. Storage cabinets
      c. Administrative supplies
      d. Clinical Supplies

II. Taking Inventory of Medical Office Supplies
   A. Understanding Your Responsibilities
      a. The inventory filing system
      b. The inventory card or record page
      c. Reorder reminder cards
      d. Inventory reminder kits
   B. Scheduling Inventory and Ordering
      a. Established ordering times
   D. When to Order Ahead of Schedule
      a. Unanticipated shortage of supply items

III. Ordering Supplies
   A. Locating and Evaluating Supply Vendors
      a. Gathering competitive prices
      b. Setting up a supply budget
      c. Comparing vendors
   B. Competitive Pricing and Quality
      a. Unit pricing
      b. Rush orders
c. Mail-order companies
d. Purchasing groups
e. Group buying pools
f. Cost controls
C. Benefits of using Local Vendors
D. Payment Schedules
E. Ordering Procedures
   a. Order forms
   b. Purchase requisitions
   c. Checking orders received
   d. Material Safety Data Sheets
   e. Correcting Errors
   f. Invoices
   g. Disbursements
F. Avoiding Common Purchasing Mistakes

VII. Establish guidelines for maintaining and evaluating office equipment
VIII. Describe and develop procedures for purchasing and up-grading office equipment.
IX. Describe role of medical assistant in maintaining the physical plant

RESOURCES:
   Lecture with demonstration
   Textbook reading assignments
   Textbook questions-CD
   Inventory forms
   Purchasing Forms
   Purchase and Lease Agreements
   Tests

OUTCOMES MEASUREMENT:
   Textbook exercises
   Competency checklists
   Chapter tests
UNIT 7 USING AND MAINTAINING OFFICE EQUIPMENT

GOAL: To familiarize the student with the maintaining and evaluating office equipment

LEARNING OBJECTIVES:

1. Describe the types of office equipment used in a medical practice
2. Explain how each piece of office equipment is used
3. Explain the steps in making purchasing decisions for office equipment
4. Compare and contrast leasing and buying
5. Explain a warranty, a maintenance contract, and a service contract, and discuss the importance of each.
6. Explain when troubleshooting is appropriate and what actions may be taken.
7. Explain the information included in an equipment inventory.
8. Explain how HIPAA law applies to faxing confidential patient information.
9. Explain how HIPAA law applies to telephone conversations with patients.

COURSE CONTENT:

1. Office Communication Equipment
   A. Telephone Systems and Call Handling
      a. Multiple lines
      b. Voice mail
      c. Patient courtesy phone
      d. Cell phones-Personal and Business use
      e. Leaving a message on an answering machine or fax machine
      f. Answering machine
      g. Answering service
   B. Pagers(Beepers)
      a. Technology of paging
      b. Paging a Physician
   C. Interactive Pagers(I-Pagers)
   D. Facsimile Machines
      a. Benefits of faxing
      b. Paper
      c. Receiving a Fax
E. Typewriters
   a. Models and features

II. Office Automation Equipment
   A. Photocopiers
      a. Special features
   B. Adding Machines and Calculators
   C. Folding and Inserting Machines
   D. Postage Meters
      a. Benefits
      b. Prepaying postage
   E. Postal Scales
   F. Postal Mail
   G. Dictation-Transcription Equipment
      a. Dictating
   H. Check writers
      a. Voiding a check
   I. Paper shredders
   J. Microfilm and Microfiche Readers

III. Purchasing Decisions
   A. Evaluating Office Needs
      a. Contacting suppliers
      b. Evaluating Warranty options
      c. Preparing a Recommendation
   B. Leasing versus buying equipment
      a. Lease agreement
      b. Advantage of leasing
      c. Negotiating

IV. Maintaining Office Equipment
   A. Equipment Manuals
   B. Maintenance and Service Contracts
   C. Troubleshooting
   D. Backup systems
      a. Computers
      b. Telephones
      c. Electricity
      d. Battery power
      e. Fire extinguishers
   E. Equipment Inventory

RESOURCES:
Lecture/demonstration
Textbook reading
Textbook exercises-CD
OUTCOMES MEASUREMENT:
  Textbook exercises-CD
  Checklists
  Chapter test
UNIT 7: ACCOUNTS PAYABLE BOOKKEEPING

GOAL: To familiarize student with accounts payable bookkeeping practices used in a medical office.

LEARNING OBJECTIVES:
1. Define accounts payable bookkeeping terminology
2. Prepare payroll records
3. Develop a petty cash system
4. Prepare checks accurately
5. Use a pegboard check writing system
6. Prepare a bank reconciliation

COURSE CONTENT:
I. Overview of the accounts payable process in a medical office
   A. Supplies needed
II. Prepare Payroll and Tax records
   A. Payroll register
   B. Employee earnings records
   C. Calculate payroll taxes
III. Petty Cash Fund
   A. Establish a fund
   B. Record transactions
   C. Replenish the fund
IV. Checking accounts
   A. Setting up a checking account
   B. Writing checks
   C. Reconciling the bank statement
   D. Pegboard Check Writing system

RESOURCES:
Lecture with demonstration
Textbook reading assignments
Textbook/CD exercises
Handouts
Test

OUTCOMES MEASUREMENT:
Textbook/workbook exercises
Chapter test
UNIT 8: SEARCHING FOR A JOB

GOAL: To familiarize the student with job search procedures and to prepare a resume.

LEARNING OBJECTIVES:
1. Define job search terminology
2. Read classified ads
3. Prepare a job application form
4. Prepare a resume
5. Prepare a cover letter
6. Prepare a follow-up letter
7. Prepare a letter of resignation
8. Developing answers to interview questions
9. Participate in a mock interview

COURSE CONTENT:
I. Overview of job search procedure
   A. Identify goals
   B. Read classified ads
II. Prepare job search documents
   A. Job application form
   B. Resume
   C. Cover letter
   D. Follow-up letter
   E. Letter of resignation
III. Overview of interview procedures
   A. Dressing for the interview
   B. Interview questions
   C. Mock interview

RESOURCES:
Lecture with demonstration
Textbook reading assignments
Textbook exercises
Handouts
Video Presentations
Tests

OUTCOMES MEASUREMENT:
Textbook exercises
Completed Job Application Form (SkillsUSA)
Completed Resume
Completed Cover letter
Completed Follow-up letter
Completed Letter of Resignation
Mock Interview (SkillsUSA)
Chapter Test/quiz