

This International Student Edition is for use outside of the U.S.

TENTH EDITION

Medical Office Procedures



**Mc
Graw
Hill**

**NENNA L. BAYES
AMY L. BLOCHOWIAK**

Medical Office Procedures

10TH
Edition

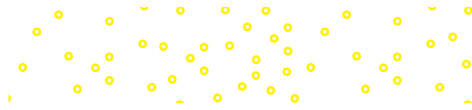
Nenna L. Bayes, AAS, BBA, M.Ed., CPC

Professor, Program Coordinator of Office Systems
Administration and Medical Information Technology,
Retired Ashland Community and Technical College

**Amy L. Blochowiak, MBA, RHIT, ACS,
AIAA, AIRC, ARA, FLHC, FLMI, HCSA,
HIA, HIPAA, MHP, PCS, SILA-F**

Healthcare Business Professional Program Director
& Instructor
Northeast Wisconsin Technical College

**Mc
Graw
Hill**



MEDICAL OFFICE PROCEDURES

Published by McGraw Hill LLC, 1325 Avenue of the Americas, New York, NY 10019. Copyright ©2022 by McGraw Hill LLC. All rights reserved. Printed in the United States of America. No part of this publication may be reproduced or distributed in any form or by any means, or stored in a database or retrieval system, without the prior written consent of McGraw Hill LLC, including, but not limited to, in any network or other electronic storage or transmission, or broadcast for distance learning.

Some ancillaries, including electronic and print components, may not be available to customers outside the United States.

This book is printed on acid-free paper.

1 2 3 4 5 6 7 8 9 LWI 24 23 22 21

ISBN 978-1-260-59792-9

MHID 1-260-59792-X

Cover Image: ©Tyler Olson/Shutterstock

All credits appearing on page or at the end of the book are considered to be an extension of the copyright page.

The Internet addresses listed in the text were accurate at the time of publication. The inclusion of a website does not indicate an endorsement by the authors or McGraw-Hill Education, and McGraw-Hill Education does not guarantee the accuracy of the information presented at these sites.

Brief Contents

Preface	viii
Part 1 THE ADMINISTRATIVE MEDICAL ASSISTANT'S CAREER	1
Chapter 1 The Administrative Medical Assistant	2
Chapter 2 Medical Ethics, Law, and Compliance	40
Part 2 ADMINISTRATIVE RESPONSIBILITIES	85
Chapter 3 Office Communications: An Overview of Verbal and Written Communication	86
Chapter 4 Office Communications: Phone, Scheduling, and Mail	116
Chapter 5 Managing Health Information	162
Simulation 1	226
Chapter 6 Office Management	230
Part 3 PRACTICE FINANCIALS	271
Chapter 7 Insurance and Coding	272
Chapter 8 Billing, Reimbursement, and Collections	316
Chapter 9 Practice Finances	358
Simulation 2	387
Part 4 PREPARING FOR EMPLOYMENT	389
Chapter 10 Preparing for Employment in the Medical Office	390
Glossary	G-1
Bibliography	B-1
Index	I-1
Working Papers	WP-1



Table of Contents

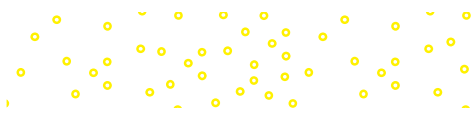
About the Authors	vii
Preface	viii
Connect	x
To the Student	xiv
Acknowledgments	xv

Part 1 THE ADMINISTRATIVE MEDICAL ASSISTANT'S CAREER 1

Chapter 1 The Administrative Medical Assistant	2
1.1 Tasks and Skills	4
1.2 Personal Attributes	8
1.3 Employment Opportunities	10
1.4 Work Ethic and Professionalism	13
1.5 Professional Growth and Certification	19
1.6 Interpersonal Relationships	22
Chapter 2 Medical Ethics, Law, and Compliance	40
2.1 Medical Ethics	42
2.2 Medical Law	45
2.3 HIPAA	62
2.4 Medical Compliance Plans and Safeguards Against Litigation	73

Part 2 ADMINISTRATIVE RESPONSIBILITIES 85

Chapter 3 Office Communications: An Overview of Verbal and Written Communication	86
3.1 The Verbal Communication Cycle	88
3.2 Nonverbal Communication	91
3.3 Written Communication	93
Chapter 4 Office Communications: Phone, Scheduling, and Mail	116
4.1 Telephone Skills	118
4.2 Scheduling	135
4.3 Processing Incoming Mail and Preparing Outgoing Mail	149
Chapter 5 Managing Health Information	162
5.1 Computer Usage	164
5.2 The Medical Record	176



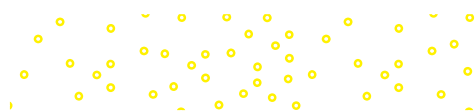
5.3 Electronic Health Records (EHRs)	179
5.4 Medical Terminology and Abbreviations	185
5.5 Technologies for Data Input	186
5.6 Documentation Formats	189
5.7 Ownership, Quality Assurance, and Record Retention	195
5.8 Filing Systems	199
Simulation 1	226
Chapter 6 Office Management	230
6.1 Physical Environment	232
6.2 Types of Management	234
6.3 The Office Manager’s Role	239
6.4 Editorial Research Projects	242
6.5 Travel and Meeting Arrangements	244
6.6 Patient and Employee Education	253

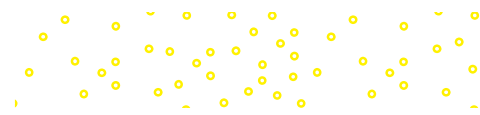
Part 3 PRACTICE FINANCIALS 271

Chapter 7 Insurance and Coding	272
7.1 Insurance Terminology	274
7.2 Insurance Plans: Identifying Plans and Payers	277
7.3 Participation and Payment Methods	284
7.4 Diagnostic Coding	290
7.5 Procedural Coding	298
7.6 Coding Compliance	304
Chapter 8 Billing, Reimbursement, and Collections	316
8.1 Recording Transactions	318
8.2 Insurance Claims	323
8.3 Payments from Patients	338
8.4 Delinquent Accounts	341
Chapter 9 Practice Finances	358
9.1 Essential Financial Records	360
9.2 Identity Theft in the Medical Office	365
9.3 Banking	367
9.4 Payroll	374
Simulation 2	387

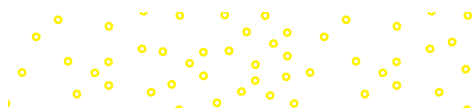
Part 4 PREPARING FOR EMPLOYMENT 389

Chapter 10 Preparing for Employment in the Medical Office	390
10.1 Searching Sources of Employment Opportunities	392
10.2 Completing an Online and a Traditional Application	395
10.3 Preparing a Cover/Application Letter	397





10.4 Preparing Résumés	400
10.5 The Interview	409
10.6 The Follow-up Contact Letter	417
Glossary	G-1
Bibliography	B-1
Index	I-1
Working Papers	WP-1



About the Authors

Nenna L. Bayes, AAS, BBA, M.Ed., CPC, has coauthored and reviewed various titles within the medical administrative fields. She earned an associate of applied business degree, a bachelor of business administration degree, and a master of arts degree in education from Morehead State University. During her tenure, she has taught numerous courses within the administrative and medical administrative curriculum. She is a retired professor and program coordinator for the Office Systems Technology and Medical Information Technology programs at Ashland Community and Technology College in Ashland, Kentucky, and has received many teaching excellence awards. She is also a Certified Professional Coder (CPC). Prior to teaching, she worked in various medical office environments. Additionally, she is a member of the American Academy of Professional Coders (AAPC) and the American Health Information Management Association (AHIMA).

She lives in Flatwoods, Kentucky, with her husband and is blessed to have two children (a daughter and a son), a daughter-in-law, and three granddaughters. She is actively involved in music and enjoys camping in her leisure time.

Amy L. Blochowiak, MBA, RHIT, ACS, AIAA, AIRC, ARA, FLHC, FLMI, HCSA, HIA, HIPAA, MHP, PCS, SILA-F, has coauthored and reviewed various textbooks within the medical administrative and insurance fields. She earned associate degrees in medical office mid-management and health information technology from Northeast Wisconsin Technical College, bachelor's degrees in both business administration and marketing from Lakeland College, and a master's degree in business administration from Lakeland College. She is currently the program director and instructor for the Healthcare Business Professional program at Northeast Wisconsin Technical College, where she sits on many committees and shares her passion for student success. Prior to teaching, she worked in various insurance industry roles for over 16 years. She is a member of the American Health Information Management Association (AHIMA).

Preface

The medical profession is complex and demanding. The typical physician rarely has time to attend to the administrative responsibilities of the office. Successfully performing the work of an administrative medical assistant requires a foundation of procedural knowledge as well as continuing education to keep up to date with technology, including computer skills, new computer software, and legal guidelines. This tenth edition of *Medical Office Procedures (MOP)* provides the required background for the responsibilities of the administrative medical assistant. To prepare students for the ever-increasing use of technology in the medical office, this revision places continued importance on the computerization of routine tasks and of communications.

Job opportunities in the medical field often change with varying degrees of education and specialization required. This textbook allows for the integrated application of office procedures, skills, and knowledge in the classroom through the use of projects and simulations. Students learn to perform the duties of the administrative medical assistant under realistic conditions and with realistic pressures that require them to organize the work and set priorities.

HERE'S WHAT YOU AND YOUR STUDENTS CAN EXPECT FROM *MOP*:

McGraw-Hill's new electronic health record tool, EHRclinic, provides a practice environment, giving students the look and feel of a real EHR system. EHRclinic is fully integrated with Connect and autograded.

- Chapter projects, end-of-chapter material, and simulations are available online in Connect, making it even easier for you and your students to access all the necessary materials in one convenient place.
- Connect provides simulated EHRclinic exercises in select chapters. These exercises simulate the use of a practice management software system to complete various tasks.
- Each chapter has been matched up with updated ABHES and CAAHEP competencies, which are listed in the chapter opener.
- The end-of-chapter material—including the Using Terminology matching questions, Checking Your Understanding multiple-choice questions, and Thinking It Through critical-thinking questions—has been updated.
- The chapter projects have been updated and aligned with the organization of the book.
- The updated Working Papers are both at the back of the book and available electronically on the Instructor Resource site in Connect.
- Art and screenshots have been updated.

ORGANIZATION OF MOP

MOP is divided into four parts:

Part	Coverage
Part 1: The Administrative Medical Assistant's Career	Introduces the administrative medical assistant's career, defining the tasks, describing the work environments, and introducing medical ethics and medical law as they apply to the administrative medical assistant. Includes section on HIPAA as it relates to the role of the administrative medical assistant.
Part 2: Administrative Responsibilities	Introduces specific administrative responsibilities, including a chapter on managing health information with technology, and provides opportunities for practice.
Part 3: Practice Financials	Discusses procedures for preparing and organizing patients' charts and bills/insurance. Includes section on compliance and introduction to the new <i>ICD-10-CM</i> code set.
Part 4: Preparing for Employment	Prepares students for employment by covering all steps of the job-search process, from completing applications to interviews and follow-up.

NEW TO THE TENTH EDITION!

The following are the key changes in the tenth edition. Chapter updates include:

- new EHRclinic exercises available in Connect.
- CAAHEP and ABHES competencies aligned with that chapter.
- updated photos.
- updated key terms.
- updated professional organization information.
- new Breach Notification section.
- updated medical laws.
- end-of-chapter tabular summary correlated with the learning outcomes.
- end-of-chapter matching and multiple-choice review questions.
- updated Thinking It Through questions.
- updated EHRclinic screenshots.



connect[®]

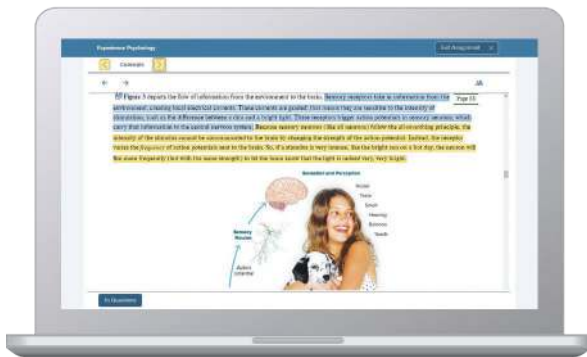
Instructors: Student Success Starts with You

Tools to enhance your unique voice

Want to build your own course? No problem. Prefer to use our turnkey, prebuilt course? Easy. Want to make changes throughout the semester? Sure. And you'll save time with Connect's auto-grading too.

65%

Less Time Grading



Laptop: McGraw Hill; Woman/dog: George Doyle/Getty Images

Study made personal

Incorporate adaptive study resources like SmartBook[®] 2.0 into your course and help your students be better prepared in less time. Learn more about the powerful personalized learning experience available in SmartBook 2.0 at www.mheducation.com/highered/connect/smartbook

Affordable solutions, added value



Make technology work for you with LMS integration for single sign-on access, mobile access to the digital textbook, and reports to quickly show you how each of your students is doing. And with our Inclusive Access program you can provide all these tools at a discount to your students. Ask your McGraw Hill representative for more information.

Padlock: Jobalou/Getty Images

Solutions for your challenges



A product isn't a solution. Real solutions are affordable, reliable, and come with training and ongoing support when you need it and how you want it. Visit www.supportateverystep.com for videos and resources both you and your students can use throughout the semester.

Checkmark: Jobalou/Getty Images

SUPPORT ^{AT}
every step

Students: Get Learning That Fits You

Effective tools for efficient studying

Connect is designed to make you more productive with simple, flexible, intuitive tools that maximize your study time and meet your individual learning needs. Get learning that works for you with Connect.

Study anytime, anywhere

Download the free ReadAnywhere app and access your online eBook or SmartBook 2.0 assignments when it's convenient, even if you're offline. And since the app automatically syncs with your eBook and SmartBook 2.0 assignments in Connect, all of your work is available every time you open it. Find out more at www.mheducation.com/readanywhere

"I really liked this app—it made it easy to study when you don't have your textbook in front of you."

- Jordan Cunningham,
Eastern Washington University



Calendar: owattaphotos/Getty Images

Everything you need in one place

Your Connect course has everything you need—whether reading on your digital eBook or completing assignments for class, Connect makes it easy to get your work done.

Learning for everyone

McGraw Hill works directly with Accessibility Services Departments and faculty to meet the learning needs of all students. Please contact your Accessibility Services Office and ask them to email accessibility@mheducation.com, or visit www.mheducation.com/about/accessibility for more information.

Top: Jenner Images/Getty Images, Left: Hero Images/Getty Images, Right: Hero Images/Getty Images



SIMULATIONS

We know that hands-on experience is an extremely valuable tool for your students. To provide that “real-life” experience, *Medical Office Procedures* features simulations that help students understand what it feels like to work in a medical practice. A 4-day simulation appears at the end of Chapters 5 and 9. The text provides instructions for the completion of the simulation. In each simulation, the student listens to the “Simulation Recordings” that accompany the program (available on Connect). The recordings contain conversations between Linda Schwartz (the doctor’s administrative medical assistant, with whom the student will identify) and Dr. Karen Larsen, various patients, and other office callers. (Note: The student may use the simulation recordings individually, or the recordings may be assigned for use by the class as a whole. A complete transcript of the Simulation Recordings appears in the *Instructor’s Manual* located within the Instructor Resources on Connect.)

Student Materials

In the “Working Papers” section at the back of the text, there are forms, medical histories, handwritten drafts, incoming correspondence, and other communications needed to complete the projects and the simulations that are provided. These Working Papers, as well as additional Project Resource Materials, are available on the Instructor Resource site in Connect.

EHRclinic Exercises

The tenth edition of *Medical Office Procedures* now includes McGraw-Hill’s new electronic health records tool, EHRclinic. EHRclinic provides realistic experiences in online electronic health records, practice management applications, and interoperable physician-based functionality. Integrated within Connect, EHRclinic allows instructors to easily incorporate these exercises into their curriculum with assignments that are assignable and autograded. EHRclinic exercises are closely aligned with course content and include assessments that measure and map student performance, allowing instructors to save time while improving outcomes.

Chapter Projects

Chapter projects, which are a critical part of practice associated with *Medical Office Procedures*, give students the opportunity to get hands-on experience with medical office tasks. Completing on-the-job tasks, especially those related to practice management software, is an important aspect of an administrative medical assistant’s work. *MOP* now offers these options for completing these tasks:

- Connect Simulated EHRclinic Exercises: Connect provides EHRclinic exercises that *simulate* the use of a practice management software system. The simulated exercises cover key practice management tasks to provide experience in working with patient, insurance, procedure, diagnosis, and transaction databases. Students will experience the look and feel of using live software, without actually having to download any software. Instructors can add them to their course by accessing them in “Assignments.” Students can follow the instructions printed in the relevant chapter projects and simulations. More detailed instructor information can also be found in the Instructor Resources site in Connect.
- Hardcopy or manual work: As always, your students will also have the option of experiencing the manual version of these practice management exercises, using the various resources included in the Working Papers and Connect. See the chapter projects for specific instructions regarding the manual options.

Instructor Resources

You can rely on the following materials to help you and your students work through the exercises in the book. The following supplements can all be found with the Instructor Resources, located through the Library tab on Connect:

- Instructor's Manual with course overview; sample syllabi; project and simulation documents; answer keys for end-of-chapter questions; and correlations to competencies from several organizations, such as ABHES and CAAHEP.
- A PowerPoint slide presentation for each chapter, containing teaching notes correlated to learning outcomes. Each presentation seeks to reinforce key concepts and provide a visual for students. The slides are excellent for in-class lectures.
- Test bank for use in classroom assessment. The comprehensive test bank includes a variety of question types, with each question linked directly to its learning outcome, Bloom's Taxonomy, and difficulty level. The test bank is available in Connect, a Word version, and a computerized version (TestGen).
- Instructor Asset Map to help you find the teaching material you need. These online chapter tables are organized by learning outcomes and allow you to find instructor notes, PowerPoint slides, and even test bank suggestions with ease! The Asset Map is a completely integrated tool designed to help you plan and instruct your courses efficiently and comprehensively. It labels and organizes course material for use in a multitude of learning applications.
- Additional materials needed to complete chapter projects.

Knowing the importance of flexibility and digital learning, McGraw-Hill has created multiple assets to enhance the learning experience no matter what the class format—traditional, online, or hybrid. This product is designed to help instructors and students be successful, with digital solutions proven to drive student success.

To the Student

You have chosen a fascinating, challenging profession. The field of healthcare is growing at a rapid pace, providing many opportunities for the trained professional. Welcome to an educational resource designed to prepare you for immediate and long-range success as an administrative medical assistant. In this course, you will use *Medical Office Procedures (MOP)* not only as a source of practical information but also as an instrument for realistic practice in applying what you have learned. Throughout the chapters, you will be asked to apply your newly acquired knowledge—not simply to tell how or why you would use the information on the job. You will then repeatedly apply the information throughout the text.

As you complete the designated projects within the text, you will accumulate many of the medical records and correspondence needed in the simulations that occur after Chapters 5 and 9. You will be asked to assume the role of Linda Schwartz, an administrative medical assistant. During each simulation, you will handle various tasks assigned by the physician, the patients, and other office callers after listening carefully to recorded conversations. With some instructor guidance, you will perform your duties in an appropriate manner. You will be performing a variety of closely related administrative medical office tasks in the simulations: answering the telephone, scheduling appointments, taking messages, filing, preparing bills, and so on. You will gain proficiency in performing a wide range of administrative activities and in coping with a variety of problems and pressures in the medical office. All these activities will help you strive to organize work, set priorities, relate one task to another, and manage time. After completing these simulations, you will find that you are well prepared for the transition from classroom to office.

Starting with Part 2, you will be “working” for Dr. Karen Larsen, a family practitioner. As directed, **save your work from the chapter projects.** This work will form the basis for your “office files.” In the simulations, you will use and add to these files. Essential patient data and forms are provided in the Working Papers section of the book, Connect, or your instructor’s learning management system. You will also need the following supplies:

- File folder labels and 31 file folders
- A ring binder or a file folder to serve as your appointment book if you are not using Connect to complete exercises
- An expandable portfolio to serve as your file cabinet (all your office files can be stored in this portfolio)
- Paper for printing
- External storage device, such as a USB flash drive, to store the projects as directed
- Miscellaneous items—rubber bands, a notepad, pens, pencils, paper clips, and so on

Acknowledgments

Suggestions have been received from faculty and students throughout the country. This is vital feedback that is relied upon with each edition. Each person who has offered comments and suggestions has our thanks. The efforts of many people are needed to develop and improve a product. Among these people are the reviewers and consultants who point out areas of concern, cite areas of strength, and make recommendations for change. In this regard, the following instructors provided feedback that was enormously helpful in preparing the tenth, and previous editions, of *MOP*.

REVIEWERS FOR THE TENTH EDITION

Many instructors assisted in reviewing the ninth edition manuscript, helping us shape the content for this tenth edition, and we thank them for their feedback and insightful suggestions:

Beverly Bartholomew, M.Ed., CPC, CPC-I

Wake Tech Community College

Dr. Melba Bolling

Virginia Highlands Community College

Lisa Branham, MLIS, MEd

Greenville Technical College

Sharon Breeding, MAE

Bluegrass Community and Technology

Tanya Byrd-Johnson, BBA, MEd

West Georgia Technical College

Tammy A Davis, MHA, RHIA, CHTS-PW, CAHIMS

Southeast Community and Technical college

Mary Donahee-Rader, BBA, CMA(AAMA)

Schoolcraft College

Maya Fernandez, Ed.D., MBA

Cedar Valley College

Savanna Garrity, MPA, CPC

Madisonville Community College

Brandy V. Gustauvs, DHSc, MS, RHIA, CCA

St. John's River State College

Starra Herring, BSHA, BSAH, CMA(AAMA), AHI, MBA, MAHA

Stanly Community College

Coleen S. Jones, MEd

Valencia College

Jackie Jones, MS, RHIA

Delgado Community College

Jane A. Jones, BS, MAT, COI, CMAA, CEHRS

Mountain Empire Community College

Bette Keeny, MS

Reading Area Community College

Sheryl Krey, MBA, CMPB, CHRS, CHIS
Washtenaw Community College

Kathleen Locke, MBA
Spartanburg Community College

**Christine Malone, Ed.D, MBA, MHA,
CMPE, CPHRM, FACHE, EvCC**
Everett Community College

Candice Milam, CMA (AAMA), MEd.
Danville Area Community College

Cheryl A Miller, MBA/HCM
Westmoreland County Community
College

Tiffinee Morgan, Professor, CMAA
West Kentucky Community and
Technical College

Julie L. Myhre, BA, CMT-R, RHIT
Century College

**Rose Nelson, (MAAC), (BCSC),
(EHRC), (PHIC)**
The Workforce Institutes City College

**Barbara Parker, BSEd, CMA (AAMA),
CPC**
Olympic College

**Patricia A. Saccone, MA, RHIA, CDIP,
CCS-P, CPB**
Waubensee Community College
Aurora Illinois

Wendy Sammons, CMA, AAT, LPN
Lanier Technical college

Sonya L. Sample, MSHRD
Clemson University

Stephanie Vergne, MAED, RHIA, CPC
Hazard Community & Technical
College

ACKNOWLEDGMENTS FROM THE AUTHORS

To the students and instructors who use this book, your feedback and suggestions have made *MOP* a better learning tool for all.

I especially want to thank the editorial team at McGraw-Hill—Michelle Vogler, Marah Bellegarde, Erin DeHeck, and Ann Courtney—for their enthusiastic support and their willingness to go the extra mile to get this book revised.

And to my loving and supportive family: my husband, Bruce; my children, Jennifer and Andrew and his wife, Ashley; my three amazing granddaughters, Addison, Alianna, and Aubriella for their unending love and support. To my loving and supportive mom who lost her brief battle with pancreatic cancer during the final stage of *MOP10* but remained a constant source of encouragement and to my dad, who passed away but continues to encourage me. To each of you—your constant encouragement keeps me moving forward. Thank you.

Nenna Bayes

Thank you to the students and instructors that use this textbook. Your suggestions and feedback helps us make improvements to ensure we put forth the best learning tool for everyone.

I also want to thank the editorial team at McGraw-Hill for their continued support.

To my family: my husband, Tom; my children, Brandon and his wife Maria, Bryanna and her significant other Ken, thanks for always encouraging me to try new things and providing support when I need it most.

Amy Blochowiak

PART

1

The Administrative Medical Assistant's Career

CHAPTER 1

The Administrative Medical Assistant

CHAPTER 2

Medical Ethics, Law, and Compliance

Welcome to *Medical Office Procedures*! This textbook has been written specifically to provide you with the skills and knowledge you will need to succeed as an administrative medical assistant. In Part 1, you will learn about the role of the administrative medical assistant, as well as legal and ethical aspects of the career.

CONSIDER THIS: Physicians' offices, hospitals, clinics, and other employers hire administrative medical assistants. *In what type of medical setting do you intend to pursue your career?*

Chapter

1

The Administrative Medical Assistant



Tanya Constantine/Blend Images/SuperStock

LEARNING OUTCOMES

After studying this chapter, you will be able to

- 1.1 describe the tasks and skills required of an administrative medical assistant.
- 1.2 list and define at least three personal attributes essential for an administrative medical assistant.
- 1.3 describe the employment opportunities in various medical settings and specialties and nonmedical settings.
- 1.4 identify and define at least six positive work attitudes that contribute to the work ethic and professionalism of an administrative medical assistant.
- 1.5 list three advantages of professional affiliation and certification.
- 1.6 apply elements of good interpersonal communication to relationships with patients and others within the medical environment.

KEY TERMS

Study these important words, which are defined in this chapter, to build your professional vocabulary:

AAMA
accuracy
administrative medical assistant (AMA)
AHDl
AMT
assertiveness

certification
confidentiality
dependability
efficiency
empathy
ethnocentrism
flexibility

good judgment
honesty
IAAP
initiative
maturity
problem-solving
professional image

punctuality
self-motivation
tact
team player
thoroughness
work ethic

ABHES

- 1.a. Describe the current employment outlook for the medical assistant.
- 1.c. Describe and comprehend medical assistant credentialing requirements, the process to obtain the credential, and the importance of credentialing.
- 1.d. List the general responsibilities and skills of the medical assistant.
- 4.h. Demonstrate compliance with HIPAA guidelines, the ADA Amendments Act, and the Health Information Technology for Economic and Clinical Health (HITECH) Act.
- 5.a. Respond appropriately to patients with abnormal behavior patterns.
- 5.b.1. Use empathy when communicating with terminally ill patients.
- 5.c. Assist the patient in navigating issues and concerns that may arise (i.e., insurance policy information, medical bills, and physician/provider orders).
- 5.f. Demonstrate an understanding of the core competencies for Interprofessional Collaborative Practice (i.e., values/ethics; roles/responsibilities; interprofessional communication; teamwork).
- 5.h. Display effective interpersonal skills with patients and healthcare team members.
- 5.i. Demonstrate cultural awareness.
- 7.g. Display professionalism through written and verbal communications.
- 8.j. Make adaptations for patients with special needs (psychological or physical limitations).
- 10.b. Demonstrate professional behavior.
- 10.c. Explain what continuing education is and how it is acquired.

www.abhes.org/accreditationmanual

The ABHES standards appear with permission of The Accrediting Bureau of Health Education Schools

CAAHEP

- V.C.3. Recognize barriers to communication.
- V.C.4. Identify techniques for overcoming communication barriers.
- V.C.18.a. Discuss examples of diversity—cultural.
- V.C.18.b. Discuss examples of diversity—social.
- V.C.18.c. Discuss examples of diversity—ethnic.
- V.P.5.a. Coach patients appropriately considering cultural diversity.
- V.P.5.c. Coach patients appropriately considering communication barriers.
- V.A.1.a. Demonstrate empathy.
- V.A.3.a. Demonstrate respect for individual diversity, including gender.
- V.A.3.b. Demonstrate respect for individual diversity, including race.
- V.A.3.c. Demonstrate respect for individual diversity, including religion.
- V.A.3.d. Demonstrate respect for individual diversity, including age.
- V.A.3.e. Demonstrate respect for individual diversity, including economic status.
- V.A.3.f. Demonstrate respect for individual diversity, including appearance.
- X.A.1. Demonstrate sensitivity to patient rights.
- X.C.5. Discuss licensure and certification as they apply to healthcare providers.
- XI.C.1.a. Define *ethics*.
- XI.C.1.b. Define *morals*.
- XI.C.2. Differentiate between personal and professional ethics.
- XI.C.3. Identify the effect of personal morals on professional performance.

2015 Standards and Guidelines for the Accreditation of Educational Programs in Medical Assisting, Appendix B, Core Curriculum for Medical Assistants, Medical Assisting Education Review Board (MAERB), 2015.

INTRODUCTION

As the population ages, new healthcare reforms are implemented, and newer technologies, medicine, and treatments are introduced into the healthcare industry, the opportunities for rewarding careers in medical environments increase. These changes also pose new challenges for healthcare professionals. Legal and ethical issues abound. Following procedures that comply with government regulations

concerning patients' privacy and security is also critical.

Because of rapid changes and the increasing complexity of the healthcare industry, continuing education is necessary to succeed in performing the role of an administrative medical assistant. Equally important is exhibiting the personal attributes and work ethic that contribute to the smooth and efficient operation of the medical practice team.

1.1 TASKS AND SKILLS

The healthcare industry focuses on preventing, diagnosing, treating, and managing diseases. Delivery of healthcare services is provided by trained professionals such as doctors, nurses, dietitians, physical and occupational therapists, nurses, and medical assistants in a variety of settings. Medical assistants are medical office professionals who capably perform a number of tasks in a wide variety of settings. Administrative tasks are those procedures used to keep the offices in medical practices running efficiently. Clinical tasks are those procedures the medical assistant may perform to aid the physician in the medical treatment of a patient. General tasks are skills and knowledge that enable the medical assistant to function within the office and patient environment. The American Association of Medical Assistants' Role Delineation Chart outlines the areas of competence you must master as an entry-level medical assistant. It provides the basis for medical assisting and evaluation. Students in an accredited medical assisting program are required to master the three areas of competence: clinical, administrative, and general. The AAMA Role Delineation Chart is also a good reference source that identifies the skills, duties, and procedures that medical assistants (administrative, clinical, and general) are educated to perform. For more information on the AAMA, please visit www.aama-ntl.org. Students in an administrative medical assistant program need to master the administrative and general competencies.

This textbook concentrates on administrative responsibilities, which involve the technical skills and personal traits required in most medical office careers. Throughout the text, the administrative medical assistant is often referred to as the "assistant" or as the "AMA" rather than by the full title. Other occupational titles for the administrative medical assistant are "medical receptionist" and "front office specialist."

Administrative Medical Assisting Tasks

The **administrative medical assistant (AMA)** is a professional office worker dedicated to assisting in the care of patients. To effectively perform all the required tasks, an assistant must be proficient in a number of skills. Hard skills, which are teachable, measurable skills, are used by the administrative medical assistant to perform many of the required office tasks.

The following are the major categories of tasks performed by an administrative medical assistant:

- Front desk procedures
- Scheduling
- Records management
- Administrative duties
- Financial

Front Desk. The administrative medical assistant greets patients and other visitors, such as family members and pharmaceutical representatives. The assistant also verifies and updates personal and demographic data about patients, explains the fees that will be charged for services, collects payments, and guides patients through their medical office encounters. The area should be kept clean and well-organized. All information should be maintained in a manner that protects the confidentiality of all patients. This is discussed in more detail later in this chapter and in a later chapter.

Scheduling. The administrative medical assistant answers the telephone; schedules future office appointments either by phone, electronically, or in person; schedules out-of-office encounters, such as hospital admissions, laboratory testing, and referrals to specialists; and forwards telephone calls and/or takes messages according to office procedures.

Records Management. The administrative medical assistant creates and maintains patient medical records (referred to as charts, electronic medical records, and/or electronic health records); stores and retrieves the records for use during encounters with physicians; and files other kinds of documents. The assistant begins the electronic chart by inputting patient demographic and financial information into the electronic database. As offices continue the process of converting to electronic health records, the assistant may assume the responsibility for scanning hardcopy charts into the electronic database.

Administrative Duties. The administrative medical assistant opens and sorts incoming mail, prepares outgoing mail, and composes routine correspondence. The assistant also maintains physicians' schedules, which involves keeping track of the time required for office encounters with patients, meetings, and conferences, as well as coordinating patients' hospital admissions and surgical procedures.

Financial. The administrative medical assistant codes or verifies codes for diagnoses and procedures; processes and tracks insurance claims; posts payments and prepares patients' bills; assists with banking duties; guides patients to available financial arrangements for payment; and maintains financial records.

Administrative Medical Assisting Skills

The work of an administrative medical assistant, which requires many technical and personal skills, is interesting and varied. Customer service to patients and other medical office team members is also provided by the administrative medical assistant. The role of the administrative medical assistant differs from that of the clinical medical assistant in that the clinical portion deals exclusively with the performance of medical tasks, such as taking blood samples and preparing a patient for a medical procedure. Administrative medical assistants focus on administrative tasks ("front office skills"), such as those listed in subsequent sections.

Communication Skills. The assistant must understand and use impeccable English grammar, style, punctuation, and spelling in both writing and speaking. These skills enable the assistant to handle correspondence, to maintain medical records, and to interact professionally with staff members, patients, and other medical personnel.

Electronic communication is the most common and efficient mode of communication for many messages. Even though this method of communication is fast, it requires proper grammar, punctuation, and structure. Taking the time to proofread all documents prior to transmission is extremely important. Errors lead to misinformation, which can lead to mistreatment.

In the communication cycle, our nonverbal communication style is as important as—if not more important than—our verbal message. Body posture, voice tonality, and facial expressions are just a few examples of our nonverbal communication techniques. We will discuss communication skills in more depth in a future chapter.

Communicating with other medical personnel requires the knowledge, correct spelling, and proper use of anatomy, physiology, and medical terminology, including nationally recognized medical abbreviations. Both correct pronunciation and written usage of the medical language are essential communication skills within the medical environment.

Mathematics Skills. The assistant must have accurate math skills to be able to maintain correct financial records, bill insurance carriers and patients, and order and arrange payment for office supplies. Many questions asked of the medical office assistant involve a patient's financial responsibility—for example, what will be the patient's balance after insurance has paid its portion. Addition, subtraction, and percentage calculations are three math skills the assistant needs. Extracting payment information from insurance data and correctly posting to patient accounts are areas of responsibility for the administrative medical assistant.

COMPLIANCE *TIP*

The administrative medical assistant plays an important role in ensuring that the medical office's procedures comply with government regulations concerning patients' records. These rules include keeping patient information private and following guidelines for release of this information. The Medical Ethics, Law, and Compliance chapter presents information on how to stay in compliance.

Organizational Skills. Controlling the usually hectic pace of the medical environment requires the assistant to have the skills of managing time and setting priorities. Systematic work habits, the willingness to take care of details, and the ability to handle several tasks at the same time (multitasking) are essential. Scheduling, updating and maintaining records, and keeping an orderly office require strong organizational skills. The most organized individual may still encounter many days when established priorities must be rearranged. When those days happen, the administrative medical assistant must be flexible and willing to reorganize and/or reprioritize.

Data Entry Skills. Accuracy in keying data and proficiency in proofreading are vital skills in the medical office. Patient personal and financial information is keyed into the electronic database and assimilated with the medical data to produce health claim forms and patient billings, as well as many other types of integrated reports. Errors in keyed information can have drastic effects on financial and medical information. As an example, a physician prescribes 0.025 mg of a medication, and the information is keyed erroneously as 0.25 mg. The patient may suffer serious or fatal complications, and the practice could incur legal consequences. Another example would be the patient's first name being keyed in as Bill when it is listed as William on his insurance card. This error would result in the insurance claim being denied, causing a delay in payment until the claim is corrected and resubmitted.

AMAs must possess strong keyboarding and word processing skills, including mastery of the alpha, numeric, and symbol keys and functions, such as mail merge, in order to effectively process administrative medical data. Producing professional letters,

manuscripts, envelopes, and reports sends a nonverbal message about the professionalism of the office. Templates for chart notes and other commonly used formats save time and provide fewer opportunities for errors.

Computer and Equipment Skills. A basic understanding of a variety of technologies and the ability to use computers with mastery are essential workplace skills. Computers are used in every kind of healthcare setting for many different tasks. Computer programs handle electronic health records, word processing, financial spreadsheets, databases, and charts and visuals for speeches and presentations. With practice management programs, the assistant may handle patient and insurance billing and tracking, scheduling, account updating, records management, integrated reports (such as aging reports for patients and payers), and other tasks. Electronic scheduling is a popular feature because of its ease of searching and time-saving convenience.

Wireless technologies allow healthcare professionals who are away from their offices or facilities to contact staff members and computers from any location. They also have constant accessibility to patient records through interconnected electronic health records programs. Voice-recognition technology enables the physician to dictate notes using voice commands. The use of e-mail and text messaging to communicate is as widespread as telephone communication, both within the medical practice and among medical practices, hospitals, and insurance companies.

To assist effectively in patient care, the medical assistant must be able to use a computer to:

- process claims and bills and perform other routine financial tasks.
- maintain the office schedule.
- edit, revise, and generate documents.
- scan and send documents to other locations.
- communicate electronically within and outside the workplace.
- research and obtain information from electronic sources, such as the Internet.

Knowing how to use basic technologies, such as copiers, fax machines, scanners, and calculators has long been a requirement for every office professional. Multiple-line telephone systems are also standard office equipment. Records must be kept on service agreements, in addition to warranties, repair records, and instructional materials for each piece of equipment. Knowing where and whom to call when equipment malfunctions is critical to the efficient flow of the office environment. Continuing to develop computer skills and learning new technological applications are crucial to the effectiveness and career advancement of administrative medical assistants.

Interpersonal Skills. Excellent interpersonal skills often come from a genuine desire to work with people. This desire and these interpersonal skills are essential for the administrative medical assistant, who is usually the patient's first contact with the medical office. That contact sets the tone for the patient's visit and influences the patient's opinion of the physician and the practice.

Many patients need someone to assist them with understanding the medical jargon sent to them from parties such as insurance carriers. The medical office assistant serves as a liaison or advocate for the patient to help translate the insurance language into everyday language and explain other medical office information.

The assistant skilled in positive communication with patients is warm, open, and friendly. Patients appreciate attention and concern—for their schedules and their comfort. Effective interpersonal skills involve looking directly at the person being spoken to, speaking slowly and clearly, listening carefully, and checking for understanding of the communicated message. Communication is discussed in a future chapter.

Respect for and openness to the other person are often shown by a pleasant facial expression and a genuine, natural smile. At the heart of interpersonal skills is sensitivity to the feelings and situations of other people.

1.2 PERSONAL ATTRIBUTES

In addition to essential office hard skills, the success of the administrative medical assistant depends on a variety of soft skills. Soft skills are less tangible, more subjective attributes of an individual. A positive attitude toward work and a cheerful personality are examples of soft skills. *Personality* has been defined as the outward evidence of a person's character. Many aspects of personality are important in dealing with patients and other medical professionals.

Because patients entering a healthcare setting may be anxious, fearful, or unwell, most of them value a friendly, pleasant personality as the most important attribute of a medical assistant. The qualities discussed here are components of a pleasant personality and are useful professional and personal skills.

Genuine Liking for People

A genuine enjoyment of people and a desire to help them are keys to success in a medical assisting career. These qualities are expressed in the way you communicate with people through speech and body language.

Because patients may worry that they will be viewed only as numbers and notes on their patient charts, it is important that they feel recognized as individuals. In communicating with patients, your warmth and attentiveness help reassure patients and signal your desire to help. Looking directly at the patient and listening with attention communicate acceptance of the person. A pleasant facial expression, a natural smile, and a relaxed rather than rigid body posture are all body language signs that express openness and acceptance.



Figure 1.1

The administrative medical assistant enjoys working with people. How do assistants show their care and concern for patients? Fuse/Corbis/Getty Images

Viewing yourself and colleagues as integral medical office team members creates an atmosphere of cooperation and respect for individual differences. At times, personalities may seem to be in conflict; however, the individual who has a genuine liking of people will be able to respect differences within the team environment and accentuate the positiveness of cooperation through differences. Individuals change or lose positions more frequently due to the inability to get along with others than they do for lack of skills. Never underestimate the value of an open mind and of “playing nicely.”

Cheerfulness

The ability to be pleasant and friendly is an asset in any career. Lifting patients’ spirits helps build goodwill between them and the physician. A pleasant assistant can frequently head off difficulties that occur when patients become worried, anxious, confused, or irritable.

EXAMPLE: CHEERFULNESS TOWARD A FRUSTRATED PATIENT

It is five o’clock, normal closing time for the office. The doctor is behind schedule because of several difficult cases, and there are two patients yet to be seen in the waiting room. One of the patients approaches the assistant.

Patient: I’ve been waiting a long time to see the doctor. How much longer will I have to wait?

Despite feeling tired at the end of the day and ready to go home, the assistant remains cheerful and explains the situation without frustration.

Assistant: Dr. Larsen has had several difficult cases today that have caused this delay. She will see you next, but it may be another 20 to 30 minutes. Would you like to wait or would you prefer to reschedule your appointment?

In this example, the patient may be feeling forgotten or ignored. Frequently, delays do occur. Patients should be kept apprised of delays and given the opportunity to choose to continue to wait or to reschedule their appointment.

Empathy

Many of the personal traits needed to be a successful medical assistant spring from **empathy**, a sensitivity to the feelings and situations of other people. Empathy enables you to understand how a patient feels because you can mentally put yourself in the patient’s situation. Empathetic phrases such as “Insurance forms can be confusing” or “You seem confused; may I help?” may be used to show the patient you are concerned about his or her situation. Phrases that emphasize yourself or give false impressions, such as “I completely understand how you feel,” should be avoided. Everyone has had some personal experience with an illness or with not feeling well. Reminding yourself of how you felt and of how you wanted to be treated in that situation will help you treat patients with kindness.

EXAMPLE: EMPATHY TOWARD A PATIENT

Assistant: Mr. Patient, I realize you are not feeling well after your surgery yesterday. Would you feel more comfortable lying down while you wait?

Understand that nervous patients may not be listening clearly to your instructions. Offering to repeat them and answering questions are other examples of empathy.