

MISSION TRAILS REGIONAL OCCUPATIONAL PROGRAM

- 1. COURSE TITLE:** **MEDICAL/DENTAL CLERICAL ADMINISTRATIVE SPECIALIST**
- 2. CBEDS TITLE:** **Medical Office Services**
- 3. CBEDS NUMBER:** **4242**
- 4. JOB TITLES:**
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| Hospital or Medical/Dental Secretary | 201.362.014 |
| Hospital or Medical/Dental Clerk | 205.362.018 |
| Hospital or Medical/Dental Appointment Clerk | 237.367.010 |
| Hospital or Medical/Dental Insurance Clerk | 214.362.022 |
| Hospital Admitting Clerk | 205.362.018 |
| Hospital Outpatient Admitting Clerk | 205.362.030 |
| Hospital or Medical/Dental Collection Clerk | 241.357.010 |
| Hospital or Medical/Dental Records Clerk | 245.362.010 |
| Hospital or Medical/Dental Records Technician | 079.367.018 |
| Hospital or Medical/Dental Fee Clerk (Insurance) | 214.482.018 |
| Hospital or Medical/Dental Administrative Clerk | 219.362.010 |
- 5. COURSE DESCRIPTION:** This course is designed to enable students to develop skills for successful job placement in a Medical or Dental Clinic/Office. Students will gain competence in areas such as: oral and written communication skills, electronic and manual scheduling and appointment control, records management, preventative recall, business confidentiality etiquette, electronic and manual processing of insurance forms and claim management, gain knowledge of different patient insurance plans, Hospital or Medical/Dental terminology, dental charting, accounts receivable, and computer use in a medical or dental office. This course outline reflects the Business Education Model Curriculum Standards and Program Framework in Office Education from the California State Department of Education. The class emphasis is on competency-step programs assisting students to acquire skills for the following jobs named above:
- 6. HOURS:** 180 up to 360
- 7. PREREQUISITES:** Students qualified to take Community Classroom require:
-own transportation to assigned doctor's office, clinic, or hospital sites.
-proof of childhood communicable diseases, TBN Skin test (or negative chest x-ray)
-must have good oral and written communication skills
- 8. REVISION DATE:** March 11, 2008

COURSE OUTLINE:

a) CONTENT AREA SKILLS

i) EXPECTED STUDENT OUTCOMES

ii) HOURS OF INSTRUCTION

COURSE OUTLINE

CONTENT AREA SKILLS	EXPECTED STUDENT OUTCOMES	HOURS		
		CL	CC	CP
Instruction will include:	Student will be able to:			
1. The Administrative Hospital or Medical/Dental Assistants Career. a) Hospital or Medical/Dental Office opportunities b) Qualifications for success c) Hospital or Medical/Dental Ethics and Law	1.a) Understand Hospital or Medical/Dental Office opportunities <ul style="list-style-type: none"> • discuss possible job settings available • list tasks performed by Hospital or Medical/Dental Administrative Assistant • explore Career opportunities and projected trends • describe steps in a job search • write a resume, cover letter • write an interview follow-up letter • complete a job application form • demonstrate punctuality and regular attendance • explain job interview preparation steps • participation in a mock interview and critique 	10	10	
	1.b) Understand Qualifications for success <ul style="list-style-type: none"> • describe appropriate appearance of a well groomed assistant • discuss the appropriate appearance of a well groomed assistant. • discuss social relationship between: assistant and staff, and assistant and patients • discuss how to handle a talkative coworker, inquisitive patient, and communication barriers • work cooperatively, share responsibilities, accept supervision and assume leadership roles. • recognize problem situations; identify, locate and organize needed information or data; and purpose, evaluate and select from alternative solutions. • demonstrate cooperative working relationships and prepare etiquette across gender and cultural groups 	10	10	
	1.c) Understand Hospital or Medical/Dental Ethics and Law <ul style="list-style-type: none"> • define ethics, etiquette, and medical liability • discuss the principles of medical ethics as they apply to both physicians and medical assistants • explain what is meant by implied, informed, expressed, and written consent • demonstrate appropriate behavior when asked for information about a patient and when a patient requests treatment advice • Identify situations requiring a release of information or a consent form • Identify and understand the terms of confidentiality 	10	10	

<p>2. Administrative Responsibilities</p> <p>a) Telephone Procedures b) Appointments c) Records Management d) Written Communications</p>	<p>2.a) Demonstrate proficiency in Telephone Procedures</p> <ul style="list-style-type: none"> • describe components of a phone greeting, answering a Hospital or Medical/Dental office phone, handling emergency calls, and putting callers on hold • understand the importance of proper message documentation • provide feedback of accomplished tasks in written format • list and explain the important qualities of a good telephone voice, • list and explain the steps necessary to answer; place on hold, and transfer a business telephone call. • list and explain the steps used to screen calls in a Hospital or Medical/Dental office or clinic. • list what is needed to record telephone messages for another person. • list and explain the types of outgoing telephone calls made in a Hospital or Medical/Dental office or clinic. • list and explain the special features of telephone equipment used in a Hospital or Medical/Dental office or clinic. • use of fax machine to transmit documents <p>2.b) Understand and practice proper appointment scheduling</p> <ul style="list-style-type: none"> • apply proper technique in maintain an electronic and manual appointment book • provide appropriate responses according to the urgency, availability of appointment time, or doctor unavailability • describe the use of a recall list • list the steps in performing the daily routine associated with the appointment schedule <p>2.c) Demonstrate proficiency in Records Management</p> <ul style="list-style-type: none"> • correctly use an alphabetic filing system • describe use of a tickler file • prepare patients files in alphabetical order • identify the types of filing equipment and supplies • review techniques to locate misfiled or lost records • describe the essential factors for recordkeeping on patient charts • explain the legal ramifications associated with records and their transfer/retention <p>2.d) Demonstrate proficiency in Written Communications</p> <ul style="list-style-type: none"> • process incoming and outgoing mail • describe mail classifications • compose written communications for a variety of situations in the Hospital or Medical/Dental office or clinic, electronically and manually • apply correct letter formatting and letter styles electronically and manually • use and implement word processing in generating medical documents • use and implement procedures and equipment involved in machine transcription 	<p>25</p> <p>25</p> <p>25</p> <p>25</p>	<p>10</p> <p>15</p> <p>15</p> <p>10</p>	
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<p>3. Patient Records a) Preparing Medical Records b) Billing</p>	<p>3.a) Demonstrate proficiency in Preparing Hospital or Medical/Dental Records</p> <ul style="list-style-type: none"> • list reasons for maintaining a patient’s records • discuss components of the medical records format referred to as SOAP • transcribe dictation and enter into patient’s chart • explain method for correcting an error made in a patient’s chart • interpret dental charting symbols • distinguish between different tooth numbering systems • implement knowledge of diagnostic coding <p>3.b) Demonstrate proficiency in electronic and manual Billing procedures</p> <ul style="list-style-type: none"> • explain how fees are determined • obtain necessary credit information about patient • compute charges and make appropriate entries for services rendered, charges, and payments • prepare payment for services rendered • prepare effective collection letters 	<p>25</p> <p>10</p>	<p>5</p> <p>10</p>	
<p>4. Financial Responsibilities a) Health Insurance b) Financial Records</p>	<p>4.a) Understand and implement procedures in electronic and manual Health/Dental Insurance</p> <ul style="list-style-type: none"> • discuss the assistant’s role in processing insurance claims • describe the various types of health/dental insurance coverage • define health insurance terms • understand, process, and complete HIPPA, ADA Dental forms • explain: Medicare’s Part A and Part B; the purpose of the Medicaid program; the purpose of Worker’s compensation insurance • define and discuss HMO’s IPA’S and PPO’S • process insurance claims forms • define and use terms associated with dental insurance • discuss the purpose of insurance coding and differentiate between categories • demonstrate and complete claim forms for submission in manual and computerized method • describe types of benefits offered by dental insurance plans • comprehend standard and custom reports in the Hospital or Medical/Dental office or clinic <p>4.b) Demonstrate proficiency in maintaining Financial Records</p> <ul style="list-style-type: none"> • list the essential records in a doctor’s office • prepare a daily journal • maintain monthly summary record • explain and illustrate different payment plans including collections management • describe the functions of accounts payable and accounts receivables • list, discuss, and identify the information needed for payroll records 	<p>25</p> <p>15</p>	<p>15</p> <p>5</p>	

<p>5. Electronic Transactions a.) Entering information into a Hospital or Medical/Dental Software Program</p>	<p>5.a) Demonstrate proficiency in entering information into a Hospital or Medical/Dental Software Program</p> <ul style="list-style-type: none"> • recording patient information • set up and Maintain patient case file • understand overview on transaction entries • apply payments or adjustments • able to print walkout receipts • able to edit and delete transactions • identify insurance carrier and/or guarantor with financial responsibility • provide an account summary 	30	10	
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10.COURSE OUTLINE:

b) CAREER PERFORMANCE STANDARDS

i) EXPECTED STUDENT OUTCOMES

ii) HOURS OF INSTRUCTION

COURSE OUTLINE

CAREER PERFORMANCE STANDARDS	EXPECTED STUDENT OUTCOMES	HOURS
Instruction will include:	Student will be able to:	
1. Personal Skills <ul style="list-style-type: none"> ▪ Classroom policies & procedures ▪ Ethics <ul style="list-style-type: none"> → Work → Business ▪ Sexual harassment laws ▪ Personal skills, including positive attitude, self-confident, honesty, perseverance & self-discipline ▪ Professional appearance ▪ Time management ▪ Lifelong learning 	1. Understand how personal skill development, including positive attitude, honesty, self-confidence, time management, & other positive traits affect employability. <ul style="list-style-type: none"> ▪ Demonstrate and understand classroom policies & procedures ▪ Define work and business ethics & demonstrate the importance of ethical standards & social responsibilities in the business environment. ▪ Discuss the laws applicable to sexual harassment & discuss tactics for handling harassment situations. ▪ Demonstrate personal skills in class and/or business environment: <ul style="list-style-type: none"> → Positive attitude → Self-confidence → Honesty → Perseverance → Self-discipline ▪ Demonstrate and model personal hygiene and acceptable professional attire ▪ Prioritize tasks and meet deadlines ▪ Explain the importance of lifelong learning 	Integrated in content area skills

CAREER PERFORMANCE STANDARDS	EXPECTED STUDENT OUTCOMES	HOURS
Instruction will include:	Student will be able to:	
<p>2. Interpersonal Skills</p> <ul style="list-style-type: none"> ▪ Group dynamics ▪ Conflict resolution and negotiation ▪ Team work ▪ Etiquette across gender and cultural groups 	<p>2. Understand principles of effective interpersonal skills, including group dynamics, conflict resolution, and negotiation.</p> <ul style="list-style-type: none"> ▪ Identify and explain the key concepts of group dynamics ▪ Discuss and demonstrate the dynamics of conflict resolution and negotiation, and their importance within the business environment ▪ Demonstrate effective teamwork, share responsibilities, accept supervision and assume leadership roles ▪ Demonstrate cooperative working relationships and proper etiquette across gender and cultural groups 	<p>Integrated in content area skills</p>
<p>3. Thinking and Problem-Solving Skills</p> <ul style="list-style-type: none"> ▪ Critical and creative thinking skills ▪ Logical reasoning and problem-solving skills ▪ Numerical estimation, measurement, and calculation ▪ Identify, locate, and organize needed information and propose, evaluate, and select alternative solutions 	<p>3. Understand the importance of critical thinking and problem-solving skills in the workplace.</p> <ul style="list-style-type: none"> ▪ Apply critical and creative thinking skills in a work environment and implement a plan of improvement as needed ▪ Demonstrate logical reasoning and problem solving skills in a work environment ▪ Apply numerical estimation, measurement and calculation skills to business applications including the following: <ul style="list-style-type: none"> → Whole number math → Decimals & fractions → Counting & monetary functions → Use of tables & graphs ▪ Recognize problem situations; identify, locate and organize needed information, and propose, evaluate and select from alternate solutions 	<p>Integrated in content area skills</p>

CAREER PERFORMANCE STANDARDS	EXPECTED STUDENT OUTCOMES	HOURS
Instruction will include:	Student will be able to:	
<p>4. Communication Skills</p> <ul style="list-style-type: none"> ▪ Written communications ▪ Verbal and Nonverbal communications ▪ Active and effective listening ▪ Proper etiquette in business communications ▪ Writing and editing skills ▪ Use of reference material and handbooks ▪ Oral presentations 	<p>4. Understand principles of effective communication.</p> <ul style="list-style-type: none"> ▪ Read and implement written instructions, technical manuals, written communication, and reference books ▪ Present a positive image of verbal and nonverbal communication through use of appropriate methods ▪ Demonstrate active and effective listening skills through verbal, nonverbal and written feedback ▪ Demonstrate proper etiquette in business communications, including an awareness of requisite for international communications (languages, customs, and time zones) ▪ Demonstrate the following writing and editing skills: <ul style="list-style-type: none"> → Use correct grammar, punctuation, capitalization, vocabulary and spelling → Write, proofread and edit → Select and use appropriate forms of communication ▪ Exhibit a proficiency in the use of reference materials such as dictionary, thesaurus, telephone directory, almanac, zip code directory, and office handbooks 	<p>Integrated in content area skills</p>
<p>5. Occupational Safety</p> <ul style="list-style-type: none"> ▪ Good safety practices 	<p>5. Understand occupational safety issues, including avoidance of physical hazards</p> <ul style="list-style-type: none"> ▪ Model and implement good safety practices including: <ul style="list-style-type: none"> → Avoidance and reporting of physical hazards in the work environment → Safe operation of equipment → Proper handling of hazardous materials 	<p>Integrated in content area skills</p>

CAREER PERFORMANCE STANDARDS	EXPECTED STUDENT OUTCOMES	HOURS
Instruction will include:	Student will be able to:	
<p>6. Employment Literacy</p> <ul style="list-style-type: none"> ▪ Expand awareness of career opportunities ▪ Set employment goals and objectives ▪ Aptitudes, personal characteristics and interests ▪ Develop portfolio to C-TAP standards ▪ Develop interviewing techniques 	<p>6. Understand career paths and strategies for obtaining employment.</p> <ul style="list-style-type: none"> ▪ Explore career opportunities and develop a career plan ▪ Identify steps for setting goals and writing personal goals and objectives ▪ Examine aptitudes related to career options; relate personal characteristics and interests to educational and occupational opportunities ▪ Develop a portfolio to include the following: <ul style="list-style-type: none"> → Letter of Introduction → Cover letter → Resume → Thank you letter → Job application → Licenses, Certificates and Awards → Transcripts → Letters of Recommendation → Work Samples 	<p>Integrated in content area skills</p>
<p>7. Technology Literacy</p> <ul style="list-style-type: none"> ▪ Apply Industry specific technology ▪ Use Industry specific software ▪ Demonstrate Keyboarding ▪ Accessing information ▪ Lifelong enhancement of technology skills 	<p>7. Understand and adapt to changing technology.</p> <ul style="list-style-type: none"> ▪ Identify and demonstrate use of appropriate technology ▪ Identify and use industry specific software ▪ Demonstrate proficiency in alphanumeric keyboarding ▪ Input and retrieve information ▪ Understand the importance of lifelong learning in adapting to changing technology 	<p>Integrated in content area skills</p>

11. ADDITIONAL RECOMMENDED /OPTIONAL ITEMS

- a. **VOCATIONAL CREDIT:** 10-20 units
- b. **ACADEMIC CREDIT:**
- c. **INSTRUCTIONAL STRATEGIES:** Cooperative team work
Individualized instruction
Individual practice
Lab practical experience
Community Classroom
SDAIE techniques
Drill and practice
- d. **INSTRUCTIONAL MATERIALS:** Textbooks: Medical Office Procedures, Business Administration for the Dental Assistant, Computers for the Medical Office, Computers for the Dental Office, Being a Medical Records/Health Information Clerk, Hospital Billing, Patient to Patient, Patient Billing
Reference Manuals
Speakers from the Community and Advisory Board
Classroom Posters
Newspapers
Videos
- e. **CERTIFICATES:** Course Certificate
Successful completion of established proficiencies leading to certificate competency levels

Achievement Certificate

Minimum of one proficiency completed leading to certificate competency levels