**Business & Administrative Services Career Field Pathway**

**Medical Office Management**

**Subject Code: 142015**

**Outcome & Competency Descriptions**

**Course Description:**

Medical Office Management explores how to manage people and information in medical offices. Learners will develop skills and knowledge to code medical procedures in accordance with applicable guidelines, convert patient information into electronic medical records and manage the insurance billing and collection process. This course also includes learning outcomes in compliance, safety and risk management.

**Strand 1. Business Operations/21st Century Skills**

Learners apply principles of economics, business management, marketing and employability in an entrepreneur, manager and employee role to the leadership, planning, developing and analyzing of business enterprises related to the career field.

**Outcome 1.1 Employability Skills**

Develop career awareness and employability skills (e.g., face‐to‐face, online) needed for gaining and maintaining employment in diverse business settings.

**Competencies**

1.1.2 Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.

1.1.6 Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community and workplace roles.

**Outcome 1.2 Leadership and Communications**

Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.

**Competencies**

1.2.3 Identify and use verbal, nonverbal and active listening skills to communicate effectively.

1.2.5 Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.

1.2.9 Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).

1.2.12 Use technical writing skills to complete forms and create reports.

**Outcome 1.3 Business Ethics and Law**

Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.

**Competencies**

1.3.2 Follow protocols and practices necessary to maintain a clean, safe and healthy work environment.

1.3.3 Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).

1.3.5 Access and implement safety compliance measures (e.g., quality assurance information, safety data sheets [SDSs], product safety data sheets [PSDSs], United States Environmental Protection Agency [EPA], United States Occupational Safety and Health Administration [OSHA]) that contribute to the continuous improvement of the organization.

1.3.8 Verify compliance with computer and intellectual property laws and regulations.

**Outcome 1.4 Knowledge Management and Information Technology**

Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.

**Competencies**

1.4.1 Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).

1.4.2 Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).

1.4.3 Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.

1.4.4 Use system hardware to support software applications.

1.4.5 Use information technology tools to maintain, secure and monitor business records.

1.4.6 Use an electronic database to access and create business and technical information.

1.4.7 Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).

1.4.8 Use electronic media to communicate and follow network etiquette guidelines.

**Strand 3. Business Communications**

Learners communicate with internal and external stakeholders by applying relationship management techniques and business communication processes and strategies.

**Outcome 3.1 Customer Relations**

Develop, maintain and grow positive internal and external customer relationships.

**Competencies**

3.1.5 Describe the importance of maintaining confidentiality and security of customer information.

3.1.6 Describe how a business's image and culture reflect the brand promise.

3.1.8 Explain the role and function of customer relationship management and its impact on business processes.

**Outcome 3.5 Social Media Communication**

Plan, create and evaluate social media communications.

**Competencies**

3.5.2 Compare and contrast the use of social media for personal and business purposes.

**Strand 4. Business Governance**

Learners acquire foundational legal knowledge and apply business governance principles to minimize risk, maintain organizational compliance and establish and maintain organizational structure.

**Outcome 4.3 Compliance**

Identify policies, processes and strategies to manage compliance.

**Competencies**

4.3.3 Explain the elements of a compliance program and how requirements and expectations differ across industry sectors (e.g., financial services, healthcare, consumer products, restaurants and food and beverages, etc.).

4.3.5 Develop the elements of a basic compliance program to promote consistent behaviors (e.g., policies, procedures, training).

4.3.6 Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements and self-regulatory guidelines.

4.3.7 Discuss methods for documenting adherence to compliance policies and procedures.

**Outcome 4.6 Corporate Social Responsibility**

Identify and evaluate corporate social responsibility policies and strategies.

**Competencies**

4.6.1 Compare and contrast ethical challenges across industry sectors, global markets, nonprofit and for-profit organizations and business activities.

**Strand 6. Business Management**

Learners identify and apply policies, processes and strategies for effective management of information, projects, strategy and talent.

**Outcome 6.3 Change Management**

Plan, create and manage change initiatives.

**Competencies**

6.3.4 Evaluate opportunities for business or departmental changes.

**Outcome 6.4 Project Management**

Plan, manage and evaluate projects.

**Competencies**

6.4.4 Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

**Outcome 6.7 Onboarding and Development**

Apply policies, processes and strategies to onboard new hires and provide growth opportunities.

**Competencies**

6.7.3 Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

**Strand 7. Operations Management**

Learners identify and apply policies, processes and strategies for business operations.

**Outcome 7.1 Safety, Health and Security**

Identify, administer and evaluate safety, health and security policies, processes and strategies.

**Competencies**

7.1.1 Implement safety and security policies and procedures to protect stakeholders and minimize risk.

7.1.2 Identify types of hazardous materials and describe their impact on human health and environmental resources.

7.1.3 Describe the requirements for the treatment, storage, packaging, shipment and disposal of hazardous materials.

7.1.4 Identify strategies for protecting a business’s digital assets, customer data and other confidential business information.

7.1.6 Explain the role and function of safety inspections.

**Outcome 7.4 Quality Management**

Identify, administer and evaluate quality control policies, processes and strategies.

**Competencies**

7.4.4 Evaluate the impact of quality control on brand experience, business reputation, financial performance, procurement, sourcing options and process design.

**Outcome 7.8 Operations Risk Management**

Identify, administer and evaluate policies, processes and strategies to manage risk of operational failure.

**Competencies**

7.8.1 Compare the costs of routine operational failures (e.g., execution errors, accidents, processing failures) with non-routine operational failures (e.g., fraud, conscious violation of professional ethics, acts of nature).

7.8.3 Explain factors used to reduce the risk of routine and non-routine operational failures (e.g., automation, procedures, checklists).

7.8.5 Develop alternative strategies for performing operational duties in an emergency situation and explain the importance of planning for catastrophic risk.

**Strand 8. Data and Process Management**

Learners apply principles of business process management to collect, analyze and distribute data and maintain business knowledge and information systems.

**Outcome 8.3 Information Management**

Identify, select and evaluate information management policies, processes and strategies.

**Competencies**

8.3.1 Assess information needs, identify and evaluate information quality and apply information to accomplish a task.

8.3.2 Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).

8.3.3 Monitor and audit internal records.

8.3.4 Identify business records requiring preservation, and archive information according to retention guidelines and regulatory requirements.

8.3.5 Identify and evaluate tools, systems and processes to manage preparation and documentation of business records.

8.3.6 Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).

8.3.8 Apply policies and procedures to protect business information.

**Outcome 8.4 Business Applications**

Plan, create and evaluate technology applications.

**Competencies**

8.4.2 Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.

8.4.11 Manage data change risks (e.g., change authorization, change documentation, spreadsheet controls, test databases, offsite backups).

**Outcome 8.6 Medical Operations**

Implement business operations in medical environments.

**Competencies**

8.6.1 Register, screen and direct patients and non-patient visitors.

8.6.2 Adapt patient handling approach to address cultural needs of different patient groups (e.g., elderly, non-native English speaking).

8.6.3 Prepare data for a referring physician.

8.6.4 Recognize and respond to medical emergencies based on protocols, standard triage procedures and first aid and cardiopulmonary resuscitation (CPR) practices.

8.6.5 Conduct telephone triage procedures to obtain information required to identify urgency of needs and properly direct phone calls.

8.6.6 Determine the cause of denied insurance claims and recommend follow-up actions to resolve claims.

8.6.7 Process payments on accepted insurance claim, and post adjustments and write-offs.

8.6.8 Initiate procedures to collect remaining balances (e.g., bill patient responsibility, initiate secondary insurance claim).

8.6.9 Implement established fee schedules and discounts.

8.6.10 Manage a scheduling and registration system (e.g., monitor patient flow, verify insurance coverage, confirm appointments, process referrals).

8.6.11 Assist with completion and maintenance of the medical office credentialing process.

8.6.12 Prepare for on-site inspection by credentialing authority.

8.6.13 Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent.

**Outcome 8.7 Medical Coding and Billing**

Apply medical billing and coding procedures in accordance with applicable policies and processes.

**Competencies**

8.7.1 Explain the need for standardized patient terminology in insurance coding and processing.

8.7.2 Identify coding conventions used to obtain standardization.

8.7.3 Explain the health-care insurance system and factors impacting processing and payment of insurance claims (e.g., eligibility, insurance networks, primary and secondary providers).

8.7.4 Identify the appropriate section of authorized resources (e.g., ICD-10-CM, ICD-10-PCS, alphabetical index and tabular list) to locate and assign a code at the highest level of detail required for the code to be valid.

8.7.5 Identify condition modifiers that impact code selection (e.g., acute or chronic condition, late effects, secondary manifestations or complications, threatened condition, laterality, syndromes).

8.7.6 Identify diagnoses and conditions that have specific coding guidelines in addition to general guidelines (e.g., Human Immunodeficiency Virus [HIV], antibiotic resistant infections, sepsis, neoplasms, blood diseases), and evaluate factors influencing the reporting and collection of data on these diagnoses or conditions.

8.7.7 Code diseases for human anatomical systems (e.g., endocrine, nervous, circulatory, respiratory, digestive, musculoskeletal).

8.7.8 Code obstetric and perinatal conditions and progressions.

8.7.9 Code external causes of injury, poisoning, and morbidity.

8.7.10 Code outpatient services.

8.7.11 Distinguish between principal diagnosis and secondary diagnoses.

8.7.12 Complete required procedures and insurance forms for private insurance carriers, self-pay patients and government-insured patients using the coding of the International Classification of Diseases (ICD-10-CM and ICD-10-PCS) and Current Procedural Terminology (CPT) coding systems.

8.7.13 Identify required data elements and manage the conversion of patient information to electronic medical records (e.g., manage data collection; process consent forms; input, review, edit documents).

**Strand 9. Financial Analysis and Evaluation**

Learners apply principles of financial and managerial accounting to collect, analyze and distribute financial data, evaluate investment opportunities and operate financial services.

**Outcome 9.4 Internal Controls**

Identify, select and evaluate internal controls in compliance with applicable regulations.

**Competencies**

9.4.4 Explain the role and function of internal controls (e.g., cash controls, inventory controls, payroll controls, capital asset control, data protection, personal information controls).

9.4.5 Inspect and ensure the continued functioning of internal controls.