

Appendix N

HEALTH SCIENCE YOUTH APPRENTICESHIP

HEALTH INFORMATICS PATHWAY MEDICAL OFFICE (UNIT 6)

Unit 6: Health Informatics Pathway Medical Office

Competency

1. Maintain medical office correspondence

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Open and date correspondence

Follow prioritization guidelines for responding to requests for information

Route written, electronic, and oral requests for information, purchase orders, checks, and other business documents to appropriate parties

Sort and distribute correspondence accurately

Send requests/correspondence correctly for inter-office, registered, and certified mail, if applicable

Learning Objectives

Compare and contrast the different methods of mailing: certified, registered, inter-office, first class

Compare and contrast specific postal services and private mailing services

Discuss accounts payable processes (order invoices, shipping, receiving)

Explain the importance of tracking and monitoring accounts receivable payment for health services

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

2. Perform records management duties

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Update documents manually and/or electronically as required

Process health information requests

Verify authorizations and/or other required medical information, such as, transcription orders, prior to filing/storage

Follow up to obtain missing signature(s) and/or required medical information

File manual client records

Use filing and indexing guidelines to add and retrieve information to the client record

Store information (client records/reports/forms) promptly and accurately

Store, retain, and/or destroy manual records as directed

Adhere to the legal storage, retention, and destruction requirements for client records

Collect and enter data for special programs such as staff credentialing, utilization management, risk management, and/or infection control programs

Learning Objectives

Compare indexing and filing methods used for filing in health care organizations

Explain how client records are cross referenced manually and electronically

Explain the reasons for cross referencing and cross indexing

Outline the procedures for finding specific client records/information manually and electronically

List the legal guidelines governing storage and retention of documents

Compare retention requirements for manual and electronic documentation

List the legal guidelines for record destruction

Summarize attributes of proper information storage (accessibility, quality, security, flexibility, connectivity, efficiency, etc.)

Identify storage options (imaging, CDs, portable devices, etc)

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

3. Locate information in the client record

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Access appropriate client record
- Navigate the client record to locate the information needed
- Assemble accurate and appropriate information for the task to be completed
- Maintain confidentiality of client information

Learning Objectives

- List the ways in which identification of clients is confirmed when client records are added to the system
- Describe the systems in place to ensure that the identity of the client is correct
- Explain the use of bar codes for identification in health care settings
- Detail the common medical history components of the client record

Comments:

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Competency

4. Create and/or maintain the client record

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Obtain/update client information

Verify data/information

Ensure client identification appears on each record or form used

Enter/update required information in the client record

Confirm accuracy of entered/updated information

Use only approved abbreviations

Client record is accurate and complete

Learning Objectives

Explain the legal purposes and ownership of the client record

Describe the content within a typical client record

Compare and contrast the different types and functions of the client record

Define the electronic medical record (EMR)

Discuss the impact of the EMR on healthcare consumers and professionals

Describe how to convert time to military time AND why military time is used

Outline the procedure used in a typical health service facility for creating the client record

Explain how manual documents are linked to electronic records

Explain how to handle duplicate client records

Comments:

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Competency

5. Obtain/update client information

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Identify client

Ensure client privacy

Use good communication techniques to obtain basic client information- reason for visit, type of insurance, changes in information, etc.

Verify client information in plain language

Report/record the required information

Record data/information in the appropriate place

Correct any incorrect information in the client record

Copy or scan insurance cards or other documents as required

Use only abbreviations on the department/facility's approved list

Learning Objectives

List the ways in which identification of clients is confirmed

Explain the use of bar codes for identification in health care settings

Describe good communication techniques for eliciting accurate client information

Detail the common medical history components of the client record

Describe general documentation requirements for recording objective information and client observations

Explain the role of observations in client care

List some of the most critical client care observations to be made

Comments:

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Competency

6. Complete client identification labels

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Obtain/update client information

Enter required information on labels

Print out applicable labels

Confirm accuracy of information

Apply labels onto client records, materials, and forms as applicable

Client Identification Labels are accurate and complete

Learning Objectives

Explain the use of bar codes used in client identification

List the ways in which identification of clients and client documents is confirmed

Explain reasoning for cross referencing and cross indexing of medical records

Comments:

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Competency

7. File manual client records

Performance Standard Condition

Competence will be demonstrated

at the worksite OR in the classroom in a simulated setting. Simulation should ONLY be used IF there is no possibility of skill performance at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Use filing and indexing guidelines to file manual client records

Use filing and indexing guidelines to add and/or retrieve information to the manual client record

File manual client records/reports/forms promptly and accurately

Document all forms removed from the manual client record

Replace manual client records as soon as possible after each use

Select the correct color-coded letters/numbers for color coding a manual client record

Apply filing and indexing rules when preparing labels for manual client documents

Learning Objectives

Compare manual to electronic record keeping systems

Compare indexing and filing methods used for filing in health care organizations

Explain how client records are cross referenced manually and electronically

Explain the reasons for cross referencing and cross indexing

Outline the procedures for finding specific client records/information manually and electronically

Describe the processes for tracking client records that have been removed from the manual files

List the legal guidelines governing retention of documents

Compare retention requirements for manual and electronic documentation

Comments:

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Competency

8. Verify client and/or insurance information

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Process health information requests

Follow guidelines to verify and/or reconcile insurance information, authorizations, medical, and/or client information

Review claim(s) and/or record(s) for incomplete or inaccurate information or authorizations

Locate and/or request appropriate information required to complete the insurance claim, authorizations, and/or client record

Verify revised information with worksite professional

Update and revise information in the client record

Verify claim information with worksite professional

Complete insurance and claim forms

Learning Objectives

Define terms used in insurance plans such as third-party payer, deductible, co-payment, HMOs, PPOs

Illustrate the insurance reimbursement cycle

Compare and contrast major types of insurance plans

Compare non-government payers (commercial insurance, managed care) to government payers (Medicare, Medicaid)

Identify advantages and disadvantages of participating and non-participating insurance companies for health care professionals and health care facilities

Comments:

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Competency

9. Process health information requests

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Receive request for health information

Review request for appropriate legal requirements and authorization according to facility guidelines and HIPAA, AODA, HIV, etc. regulations

Access and obtain only health information authorized to be released

Verify information to be disclosed with worksite professional

Complete applicable tracking logs to record information disclosure

Provide requested information confidentially to authorized requesting party only

Learning Objectives

Define PHI (Protected Health Information)

Describe the impact of HIPAA on the development of health informatics

Describe the code of ethics from the American Health Information Management Association (AHIMA)

Explain the required elements on release of information authorizations

Explain how data is kept secure and confidential through control of access and release of information in your facility

Describe uses of healthcare data by providers, review agencies, researchers, administrative planners, payers, public health agencies, employers, governmental agencies, judicial process and patients

List users and uses of secondary data sources (e.g. disease, operative, physician's indexes, registries, healthcare databases such as National Library of Medicine (NLM), National Practitioner Data Bank (NPDB), Medicare Provider Analysis and Review (MedPAR))

Comments:

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Competency

10. Manage client appointments

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Verify the required elements of the medical order, if applicable for services
- Ascertain the time required for the health service(s) required by the client
- Refer client to worksite professional or guidelines for priority scheduling to address emergencies and/or urgent care
- Identify conflicts in schedule and those of the client's schedule
- Assist in recommending resolution to scheduling conflicts
- Confirm client and the department/facility have the identical appointment information
- Accurately enter appointment times and other required information
- Prepare an appointment card if client is present
- Document any scheduling changes in the correct locations
- After appointment time, documents status of the appointment: late, no show, rescheduled, cancelled, etc.

Learning Objectives

- Explain the elements of medical orders required for some types of appointments as defined by Medicare and Joint Commission standards
- List the elements about an appointment schedule that are most important to the client
- List the scheduling elements of greatest concern to the department/facility
- Describe the appointment procedures used in your department/facility
- Detail the client information required for most scheduling procedures
- Describe the importance of reminder calls for appointments
- List the types of calls that indicate a need for immediate service in your department/facility
- Explain how departments/facilities handle "no show" appointments

Comments:

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Competency

11. Answer phones

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Answers the telephone promptly
- Follows company guidelines for identifying self
- Greeting is pleasant and courteous
- Determines purpose of call
- Transfers call to appropriate individual when necessary
- Listens carefully to caller before giving any response
- Is discrete in responses made to the caller
- Does not provide confidential information without appropriate authorization
- Uses appropriate language
- Minimizes the time caller is put on hold
- Ends conversation with courteous closure
- Records telephone conversation and/or takes messages accurately

Learning Objectives

- Explain how to use the telephone in your company to place callers on hold and to transfer calls
- Describe voice qualities that convey pleasantness
- Describe the proper telephone answering procedure
- Discuss the potential for violating customer confidentiality during telephone conversations
- List the types of questions or information received from a telephone call which should be referred to the worksite professional
- Emphasize the importance of accuracy in taking telephone messages
- Detail some uses of the company telephone which would be considered unethical
- Explain the appropriate way(s) of bringing closure to a telephone conversation
- Describe the use of telephone documentation/logs required by some departments/facilities

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

12. Assist with basic coding for client billing

Performance Standard Condition

Competence will be demonstrated

at the worksite OR in the classroom in a simulated setting. Simulation should ONLY be used IF there is no possibility of skill performance at the worksite.
while assisting a worksite professional

Performance Standard Criteria

Performance will be successful when learners:

Assist worksite professional to choose codes for billing client services
Seek additional information as directed if information is unclear or missing
Apply accurate medical terminology within the scope of their learning
Utilize appropriate coding references
Assist worksite professional to enter/update coding

Learning Objectives

Describe the use of coding in billing for client services and how that affects payment for services
Describe the basic steps in the coding process
Describe the CMS (Centers for Medicare and Medicaid Services) guidelines for coding and reimbursement
Compare types of coding systems
Define terms associated with clinical classification and terminology (classification system, nomenclature, terminology, vocabulary)
Explain the format and conventions of the CPT (Current Procedural Terminology) coding system
Explain the use of modifiers in CPT coding
Explain the format and conventions of the ICD (International Classification of Diseases) procedural and diagnostic coding systems
Describe the difference between using coding books and the electronic end coder
Describe how/where to access client information needed for coding and billing purposes

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

13. Complete insurance and claim forms

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

Obtain/access client record

Locate information in the client record

Verify client and/or insurance information

Follow insurance or claim form guidance documents and instructions to fill out required information

Review the completed form with the worksite professional

Submit insurance and claim forms as required by the insurance company

Learning Objectives

Discuss issues and trends in insurance plans and health care financing

List the categories of information common to most insurance claims

Describe the information on a typical explanation of benefits (EOB) form

Explain the purpose of Worker's Compensation and why it is considered a health insurance plan

Comments:

Unit 6: Health Informatics Pathway

Medical Office

Competency

14. Perform basic bookkeeping duties

Performance Standard Condition

Competence will be demonstrated

at the worksite OR in the classroom in a simulated setting. Simulation should ONLY be used IF there is no possibility of skill performance at the worksite.

Performance Standard Criteria

Performance will be successful when learners:

Verify insurance coverage, deductibles, and co-payments using electronic systems or other means

Document disbursements or deposits to the cash drawer in the appropriate record

Process client cash, check, or credit payments according to department/facility guidelines and insurance coverage

- Make accurate change
- Operate cash register, if applicable
- Verify check information
- Process credit card payments

Calculate, prepare, and issues bills, invoices and/or account statements

Match order forms with invoices

Prepare purchase orders and expense reports

Prepare deposits

Cash Drawer balances with the day's receipts and disbursements

Learning Objectives

Define deductible and co-payment as they pertain to health care services

List the requirements for client identification when presenting a check or credit card

Indicate the importance of client verification procedures when accepting check or credit card payments

Describe components of an acceptable check

Explain your department/facility's guidelines for checks

Explain how to operate your department/facility's cash register, if applicable

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

15. Use common office software applications

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Access software application
- Utilize basic features of Spreadsheet, Word Processing, Internet, and Email applications as required for job tasks
- Change application settings as needed
- Manage files within an application
- Perform common editing and formatting functions
- Perform common printing functions
- Query, add, delete, edit, save, and print information as applicable using these software applications

SPREADSHEETS

- Modify worksheet data and structure
- Format data in a worksheet
- Sort data, manipulate data using formulas and functions
- Add and modify charts in a worksheet

WORD PROCESSING

- Format text and documents
- Insert, edit, and format tables in a document

INTERNET

- Use search engines and URLs to locate valid information

EMAIL

- Create, edit, save, send, and print email communications

PUBLISHING/PRESENTATION APPLICATIONS

- Create, edit, save, and print a document or presentation using these kinds of applications

Learning Objectives

- Classify types of computers
- Explain how computing/networking hardware and software interact
- Distinguish between system and application software
- Define directory and subdirectory
- List types of widely used software applications (e.g., word processing, database management, spreadsheet, Internet, email)
- Identify different types of information sources on the Internet
- Describe how to evaluate internet web sites and information for validity and reliability
- Describe how to develop effective presentations using appropriate technologies (e.g., tables, charts, and visual graphics)

Explain the use of writing/publishing/presentation applications
Explain the purpose and use of spreadsheet software
Describe how to format fields for size, appearance, and calculation
Describe how to sort spreadsheet ranges
Explain how to create a graph using data entered on a spreadsheet table
Give examples of when a spreadsheet would be advantageous to use over other formats

Comments:

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Competency

16. Use database systems to process information

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Select source of information and database software system needed for task completion
- Use software commands and menus appropriately
- Demonstrate appropriate file naming conventions
- Perform basic file commands in the software
- Enter, save, edit, and delete information as required
- Print using a printer

Learning Objectives

- Define health care informatics
- Compare and contrast various forms of health information media (paper, computer, web based)
- Define a database and database management
- Describe how databases are used at your worksite to manage worksite operations
- Discuss the necessity and use of data standards
- Describe the purpose and benefits of standardized data
- Define data integrity
- Discuss constraints to maintaining data integrity
- Define characteristics of data quality
- Describe the relationship of code sets to health informatics standards in computer based environments

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

17. Prepare reports

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Access correct Health Information applications and/or databases
- Query the correct applications and/or databases
- Validate the query parameters prior to execution
- Generate required reports from the applications
- Verify report content for accuracy and completeness with a worksite professional
- Assist the worksite professional with analysis of health information reports
- Report meets requester requirements
- Report is professionally presented with an explanation of the report parameters

Learning Objectives

- Discuss health information systems and the connectivity to administrative information systems
- Define query, data warehouse, data mining, and SQL

Comments:

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Competency

18. Maintain office equipment

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Follow manufacturer guideline for cleaning, maintenance, service and repair
- Identify maintenance schedule for equipment that requires routine maintenance
- Label equipment appropriately to show malfunction, if applicable
- Identify location of repair service information, maintenance manuals, and/or troubleshooting guides
- Verify procedure to follow
- Perform/call service for routine maintenance or malfunction in accordance with equipment manual/maintenance instructions and service agreements
- Assist worksite professional with back-ups and software/hardware updates
- Document the maintenance and/or repair/troubleshooting performed

Learning Objectives

- Describe the use and maintenance of your department/facility's IS/IT/office equipment such as the copier, fax, imaging equipment, laptops, work station computers, and portable devices
- Explain why performing routine maintenance of office equipment reduces costs to the facility
- Describe the materials and information needed to determine an office equipment maintenance schedule
- Describe the basic procedure to be followed when a piece of office equipment is not functioning properly in your department/facility
- Discuss how tracking of equipment maintenance and servicing is done in the department/facility
- List the critical pieces of equipment in your department/facility which require priority repairs when malfunctioning
- Explain your department/facility's back up plan and disaster recovery plan

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

19. Order and receive supplies and/or equipment

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Follow procedures for procuring supplies, equipment, and/or medications when items are not in stock, outdated, in need, and/or as scheduled
- Obtains appropriate supervisory approvals to place orders
- Refer to the preferred provider literature to locate supplies for purchase
- Order supplies, equipment, and/or medications
- Verify the receipt of a shipment with the order against the packing slip and/or original purchase order after the order arrives
- Identify supply items and/or medications requiring special handling or storage
- Store and stock items appropriately
- Report any items received that are expired and/or damaged immediately to worksite professional
- Update inventory record
- File or route warranty and service agreements for equipment to the worksite professional
- File or route the Packing Slip and/or any Material Safety Data Sheets (MSDS) received to the appropriate places

Learning Objectives

- Compare and contrast ordering procedures for routine and for emergency orders
- Explain any special procedures required to order equipment
- Discuss the issue of cost containment in health care and how that impacts ordering
- List items in your department/facility that require any special handling and/or storage
- Explain how to store items received so as to prevent loss and damage
- Compare and contrast ordering paperwork: Original Order (Manual or Electronic), Purchase Order, Packing Slip
- Describe the purpose of tracking Purchase Orders for goods and services

Comments:

Unit 6: Health Informatics Pathway Medical Office

Competency

20. Perform an inventory of supplies and/or equipment

Performance Standard Condition

Competence will be demonstrated
at the worksite

Performance Standard Criteria

Performance will be successful when learners:

- Follow procedure for inventory of supplies, equipment, and/or medications
- Adhere to schedule for completing inventory check
- Check and record quantity of items available in each category on the inventory
- Report expired, discontinued, damaged, recalled, and/or missing supplies and medications immediately to worksite professional
- Communicate changes in availability to worksite professional
- Assist with removal and disposal of expired, damaged, and/or recalled items as required
- Straighten and clean shelves
- Verify inventory record with worksite professional
- File/store verified documents

Learning Objectives

- Describe the purpose of an inventory of supplies and equipment
- Explain the purpose of lot numbers and expiration dates
- Name common supplies, pieces of equipment and/or medications used in your department/facility on a routine basis
- Indicate the type of damage to supplies, equipment, and medications that most frequently occurs
- List the types of agents included in the category of "controlled substances"
- Outline some of the regulations for prescription drugs included in the Controlled Substance Act
- Explain the variation in procedures when controlled substances are part of the inventory process
- Describe the importance of immediate action when medications are found to be missing

Comments: