



Medical Office

Youth Apprenticeship

MEDICAL OFFICE

Medical office youth apprentices perform a variety of administrative tasks in a medical office or patient scheduling centers.

Length of Apprenticeship: One year

OCCUPATIONAL COMPETENCIES

Medical Office youth apprentices must complete **a total of 10** competencies. **Nine** of the competencies must be from the list below. If necessary, employers can substitute **1** competency with another occupationally appropriate skill. That skill should be added to the competency list for assessment.

Competencies
1. Locate information in the client record 2. Create and/or maintain a client record 3. Navigate the medical record and/or client scheduling software 4. Manage client appointments 5. Answer phones 6. Perform basic payment collection 7. Use common office software applications 8. Order and receive supplies and/or equipment 9. Perform an inventory of supplies and/or equipment 10. Demonstrate customer service skills

REGISTERED APPRENTICESHIP BRIDGING OPPORTUNITIES

The following Registered Apprenticeship is available in this area:

- Medical Assistant registered apprenticeship
- Community Health Worker registered apprenticeship

POST-SECONDARY PATHWAY OPPORTUNITIES

There are several post-secondary pathway opportunities in this area. The following is a partial list.

- Medical Assistant
- Medical Administrative Professional
- Health Information Technology



Medical Office

Youth Apprenticeship

ON-THE-JOB LEARNING PERFORMANCE STANDARDS GUIDE (TO BE COMPLETED BY YA CONSORTIUM)

YOUTH APPRENTICE INFORMATION

Youth Apprentice Name	
YA Coordinator	YA Consortium
School District	High School Graduation Date

REQUIREMENTS

Level One Requirements

Youth apprentices must complete ALL the items listed below. Check completed areas.

- ☐ Competency checklist
- ☐ Employability Skills checklist (in this OJL Guide) or the DPI Employability Skills Certificate
- ☐ Related instruction equal to 1 high school credit or at least 3 college credits
- ☐ Minimum of 450 work hours

HOURS

Record the hours the youth apprentice worked.

Total Hours Employed	Company Name	Telephone Number

RELATED INSTRUCTION

YEAR 1: Indicate which related instruction courses the youth apprentice completed.

Dual Credit	Course Number and Title	Credits	Instruction Provider
☐			
☐			
☐			
☐			

SIGNATURES

The On-the-Job Learning Performance Standards Guide includes a list of competencies youth apprentices learn through mentoring and training at the worksite.

Instructions for the Worksite Employers/Mentors and School-Based or YA coordinators: This document should be reviewed with the employer/mentor, school-based or YA coordinator on a regular basis with the youth apprentice to record progress and plan future steps to ensure completion of the required competencies. Mentors, school-based/YA coordinator, and the apprentice sign below.

Employer/Mentor Signature	Employer/Mentor Signature
Employer/Mentor	Employer/Mentor
Business/Company	Business/Company
Date Signed	Date Signed
School-Based and/or YA Coordinator Signature	School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator	School-Based and/or YA Coordinator
School District or Organization	School District or Organization
Date Signed	Date Signed
Youth Apprentice Signature	Youth Apprentice Signature
Youth Apprentice	Youth Apprentice
School District / High School	School District / High School
Date Signed	Date Signed

EMPLOYABILITY SKILLS (TO BE COMPLETED BY YA EMPLOYER/MENTOR)

Youth apprentices must demonstrate key employability skills.

The DWD YA program employability skills requirement may be attained and demonstrated through two processes. (See options listed below.) Employability skills must be completed for every year a student is in the program. The DPI Employability Skills Certificate may be counted as meeting one of those two years, provided the certificate is earned in the same year the student is enrolled in youth apprenticeship or they can complete the YA Employability Skills in the OJL. The Employability Skills Certificate must be obtained through the DPI.

1. If a student has successfully completed a Wisconsin Department of Public Instruction (DPI) State-Certified Cooperative Education, [Co-Op Employability Skill certification](#) then they have met the YA Employability Skills requirement for that year. A copy of the student's DPI Co-Op Employability Skill Certificate must be maintained on file with their YA regional consortium.

☐ Earned Wisconsin Employability Skills Certificate (checked if applicable) or,

2. Completed and rated "Employability Skills" through this YA OJL guide as described below.

3	Exceeds Expectations: Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior
2	Meets Expectations: Meets entry-level criteria; requires some supervision; often displays this behavior
1	Working to Meet Expectations: Needs improvement; requires much assistance and supervision; rarely displays this behavior

The following skills are required of all youth apprentices.

Competency and Rating Criteria	Rating		
	Minimum Rating of 2 for EACH		
	Check Rating		
	1	2	3
1. Develops positive work relationships with others. <i>Examples of qualities and habits that the employee might exhibit include . . .</i> • Interacts with others with respect and in a non-judgmental manner • Responds to others in an appropriate and non-offensive manner • Helps co-workers and peers accomplish tasks or goals • Applies problem-solving strategies to improve relations with others • When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation	☐	☐	☐

Employability Skills		Rating		
Competency and Rating Criteria		Minimum Rating of 2 for EACH Check Rating		
		1	2	3
2. Communicates effectively with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Adjusts the communication approach for the target audience, purpose, and situation to maximize impact - Organizes messages/information in a logical and helpful manner - Speaks clearly and writes legibly - Models behaviors to show active listening - Applies what was read to actual practice - Asks appropriate questions for clarity	☐	☐	☐
3. Collaborates with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities - Shares responsibility for collaborative work and decision making - Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise - Avoids contributing to an unproductive group conflict - Shares information and carries out responsibilities in a timely manner	☐	☐	☐
4. Maintains composure under pressure <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Uses critical thinking to determine the best options or outcomes when faced with a challenging situation - Carries out assigned duties while under pressure - Acts in a respectful, professional, and non-offensive manner while under pressure - Applies stress management techniques to cope under pressure	☐	☐	☐
5. Demonstrates integrity <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Carries out responsibilities in an ethical, legal and confidential manner - Responds to situations in a timely manner - Takes personal responsibility to correct problems - Models behaviors that demonstrate self-discipline, reliability, and dependability	☐	☐	☐

Employability Skills		Rating		
Competency and Rating Criteria		Minimum Rating of 2 for EACH Check Rating		
		1	2	3
6. Performs quality work <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	• Carries out written and verbal directions accurately • Completes work efficiently and effectively • Performs calculations accurately • Conserves resources, supplies, and materials to minimize costs and environmental impact • Uses equipment, technology, and work strategies to improve workflow • Applies problem-solving strategies to improve productivity • Adheres to worksite regulations and practices • Maintains an organized work area	☐	☐	☐
7. Provides quality goods or services (internal and external) <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	• Shows support for the organizational goals and principles by own personal actions • Displays a respectful and professional image to customers • Displays an enthusiastic attitude and desire to take care of customer needs • Seeks out ways to increase customer satisfaction • Produces goods to workplace specifications	☐	☐	☐
8. Shows initiative and self-direction <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	• Prioritizes and carries out responsibilities without being told • Responds with enthusiasm and flexibility to handle tasks that need immediate attention • Reflects on any unsatisfactory outcome as an opportunity to learn • Improves personal performance by doing something different or differently • Analyzes how own actions impact the overall organization • Supports own action with sound reasoning and principles • Balances personal activities to minimize interference with work responsibilities	☐	☐	☐

Employability Skills		Rating		
Competency and Rating Criteria		Minimum Rating of 2 for EACH Check Rating		
		1	2	3
9. Adapts to change <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Shows flexibility and willingness to learn new skills for various job roles - Uses problem-solving and critical-thinking skills to cope with changing circumstances - Modifies own work behavior based on feedback, unsatisfactory outcomes, efficiency, and effectiveness - Displays a "can do" attitude	☐	☐	☐
10. Demonstrates safety and security regulations and practices <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Follows personal safety requirements - Maintains a safe work environment - Demonstrates professional role in an emergency - Follows security procedures - Maintains confidentiality	☐	☐	☐
11. Applies job-related technology, information, and media <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	- Applies technology effectively in the workplace - Assesses and evaluates information on the job - Assesses training manuals, website, and other media related to the job	☐	☐	☐
12. Fulfills training or certification requirements for employment <i>Examples of this requirement may include . . .</i>	- Participation in required career-related training and/or educational programs - Passing certification tests to qualify for licensure and/or certification - Participation in company training or orientation	☐	☐	☐
13. Sets personal goals for improvement <i>Examples of this requirement may include . . .</i>	- Setting goals that are specific and measurable - Setting work-related goals that align with the organization's mission - Identifying strategies to reach goals - Reflecting on goal progress to regularly evaluate and modify goals	☐	☐	☐

OCCUPATIONAL COMPETENCIES

(TO BE COMPLETED BY YA EMPLOYER/MENTOR)

Youth apprentices must perform **a total of 10 competencies**. **Nine** of the competencies must come from the list below. If necessary, employers can substitute **1** competency with another occupationally appropriate skill. That skill should be added to the bottom of the list for assessment.

Rating Scale

3: Exceeds entry level criteria | Requires minimal supervision | Consistently displays this behavior

2: Meets entry level criteria | Requires some supervision | Often displays this behavior

1: Needs improvement | Requires much assistance and supervision | Rarely displays this behavior

If any competencies are rated "1" on the final performance review checklist that is submitted to WI DWD it is considered a failed checklist.

Occupational Competencies	Rating		
	Minimum Rating of 2 for EACH Check Rating		
	1	2	3
1. Locate information in the client record - access appropriate client record - navigate the client record to locate information - assemble information as requested - maintain confidentiality of client information	☐	☐	☐
2. Create and/or maintain a client record - ensure client privacy and comply with HIPAA requirements - verify the patient's current address, phone number and allergy information - ensure client identification appears on each record or form used - confirm accuracy of information - copy or scan insurance cards or other documents as required	☐	☐	☐
3. Navigate the medical record and/or client scheduling software - open the record - accurately schedule appointments or check in clients - accurately utilize medical terminology in scheduling medical appointments	☐	☐	☐

Occupational Competencies		Rating		
Competency and Rating Criteria		Minimum Rating of 2 for EACH Check Rating		
		1	2	3
4. Manage client appointments - greet client - display sensitivity to client information - refer client for priority scheduling or urgent care - identify the time required for the health service - enter appointment and other required information - document scheduling changes in the correct locations - manage appointment reminders - enter appointment results: late, no show, rescheduled, cancelled, etc.		☐	☐	☐
5. Answer phones - answer promptly with an appropriate greeting - triage calls as appropriate - transfer call to appropriate individual when necessary minimizing time on hold - respond discretely to the caller - do not provide confidential information without appropriate authorization - take messages correctly documenting information		☐	☐	☐
6. Perform basic payment collection - 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 - operate cash register and make accurate change if applicable		☐	☐	☐
7. Use common office software applications - utilize basic features of office software - manage files within an application - perform common editing and formatting functions - perform common printing functions		☐	☐	☐

Occupational Competencies	Rating		
Competency and Rating Criteria	Minimum Rating of 2 for EACH Check Rating		
	1	2	3
8. Order and receive supplies and/or equipment • place orders for supplies, equipment, and/or medications • verify the receipt of a shipment • identify supply items and/or medications requiring special handling or storage • store and stock items appropriately • update inventory record • file or route warranty and service agreements as appropriate • file or route the Packing Slip and/or any Material Data Sheets (MDS) received to the appropriate places	☐	☐	☐
9. Perform an inventory of supplies and/or equipment • complete inventory of supplies, equipment, and/or medications • document inventory • 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	☐	☐	☐
10. Demonstrate customer service skills • focus on effective customer communication • determine responsive methods to identify and meet customer needs • determine effective customer follow-up procedures • meet the needs of the diverse customer	☐	☐	☐
Competency Substitute (if you replaced a competency above, note the competency and rating)	☐	☐	☐
Comments:			



Post-Program Completion Survey

Youth Apprenticeship

YA POST-PROGRAM COMPLETION SURVEY: **EMPLOYER FEEDBACK**

Employers complete the following information. YA Coordinators will enter this into the Post-Program Completion Survey.

YA Employer Post-Program Completion Questions	
Will you offer or have you offered the Youth Apprentice a continuing position with your company?	☐ Yes ☐ No
If continuing position offered to youth apprentice, did they accept?	☐ Yes ☐ No
If yes, please answer the questions below:	
Was the offer for full time or part time work?	☐ Full-time ☐ Part-time
Title of the position offered:	
What is the wage of the continuing employment offer?	
If applicable, will the youth apprentice advance to a Registered Apprenticeship?	

YA POST-PROGRAM COMPLETION SURVEY: **COMPLETED BY YA CONSORTIUM**

The [Post-Program Completion Survey](#) form is to be provided to each student completing the Youth Apprenticeship program to capture information on the student's plans after leaving the program. This **form should be completed by the Youth Apprenticeship Coordinator** to capture information from all high school seniors and their employers after successful completion of the Youth Apprenticeship Program.

The form should be completed during the final meeting between the student, mentor, and Youth Apprenticeship Coordinator, when the final checklist or On-the-Job Learning (OJL) Guide is filled out and signed. Information captured on this form must be entered online using the Bureau of Apprenticeship Standards Electronic Records System (BASERS).

No part of this document may be altered, duplicated, or extracted without written consent from the Wisconsin Department of Workforce Development (DWD).

DWD is an equal opportunity employer and service provider. If you have a disability and need assistance with this information, please dial 7-1-1 for Wisconsin Relay Service. Please contact the Division of Employment and Training at 888-258-9966 and press 6 to request information in an alternate format, including translated to another language.

