

Alignment Document
Medical Management and Support CTAG Alignment

This document contains information for one Career-Technical Articulation Numbers (CTANs) for the Medical Management and Support Career-Technical Assurance Guide (CTAG).

The CTAN is:
Medical Office Procedures

Medical Office Procedures - CTAN alignment with the Business Administrative Services Pathway in the Career Field Technical Content Standards of the Ohio Department of Education

General Course Description: This course emphasizes the administrative duties in the health care setting. Students will learn reception procedures, appointment scheduling, filing systems and patient medical records management, communications, basics of written correspondence, medical ethics, and law, HIPAA, and will be introduced to financial administration and office management. Students will also examine their own personal and professional ethics.

Advising Notes:
 Students must access credit within 3 years of program completion.
 Semester Credit Hours: 3

Alignment:
An asterisk (*) indicates that the learning outcome is essential and must be included in course content.

Learning Outcomes The student will be able to:	Competencies and/or Descriptors from the Medical Management and Support Pathway, Career Field Technical Content Standards/ Courses
1. Demonstrate the communication skills and professionalism needed to effectively perform front desk and telephone duties in a medical office. *	<u>1.2 Leadership and Communications:</u> Process, maintain, evaluate, and disseminate information in a business and develop leadership and team building to promote collaboration. 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. 1.4 Knowledge Management and Information Technology 1.4.1 Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).

	<p><u>3.1 Customer Relations</u>: Apply techniques, strategies, and tools to develop, maintain, and grow positive internal and external customer, or client, relationships.</p> <p>3.1.5 Maintain confidentiality or privacy of internal and external customers.</p> <p>3.1.6 Reinforce company’s image and culture to exhibit the business’s brand promise.</p> <p>3.1.7 Describe the scope of customer-relationship management to show its contribution to business.</p> <p>3.1.10 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.</p> <p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices.</p> <p>8.6.1 Register, screen, and direct patients and non-patient visitors</p> <p>8.6.4 Recognize and respond to medical emergencies based on protocols, standard triage procedures, and first aid and cardiopulmonary resuscitation (CPR) practices.</p> <p>8.6.5 Conduct telephone triage procedures to obtain information required to identify urgency of needs and properly direct phone calls.</p>
<p>2. Develop effective verbal and written communication techniques appropriate for diverse environments. *</p>	<p><u>1.2 Leadership and Communications</u>: Process, maintain, evaluate, and disseminate information in a business and develop leadership and team building to promote collaboration.</p> <p>1.2.5 Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.</p> <p>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).</p> <p>1.2.12 Use technical writing skills to complete forms and create reports.</p>
<p>3. Apply active listening skills, and analyze communications to provide appropriate responses/feedback. *</p>	<p><u>1.2 Leadership and Communications</u>: Process, maintain, evaluate, and disseminate information in a business and develop leadership and team building to promote collaboration.</p> <p>1.2.3 Identify and use verbal, nonverbal, and active listening skills to communicate effectively.</p>
<p>4. Demonstrate empathy in communicating with patients and their families, and use language/verbal skills that enable patients’ understanding. *</p>	<p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices.</p> <p>8.6.2 Adapt patient handling approach to address cultural needs of different patient groups (e.g., elderly, non-native English speaking).</p>
<p>5. Demonstrate respect for diversity in approaching patients and families. *</p>	<p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices.</p> <p>8.6.2 Adapt patient handling approach to address cultural needs of different patient groups (e.g., elderly, non-native English speaking).</p>
<p>6. Describe appointment management systems.*</p>	<p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices.</p> <p>8.6.10 Manage a scheduling and registration system (e.g., monitor patient flow, verify insurance coverage, confirm appointments, process referrals).</p>

<p>7. Demonstrate the use of an electronic appointment management system using established office policies and protocols. *</p>	<p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices. 8.6.3 Prepare data for a referring physician. 8.6.10 Manage a scheduling and registration system (e.g., monitor patient flow, verify insurance coverage, confirm appointments, process referrals). 8.6.11 Complete and maintain the medical office credentialing process. 8.6.12 Prepare for on-site inspection by credentialing authority.</p>
<p>8. Describe, identify, and explain the foundations of the U.S. law as it relates to business practices within a medical facility. *</p>	<p><u>4.3 Compliance</u>: Develop compliance systems, processes and procedures used to manage compliance risk across an organization. 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). 4.3.7 Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up). 4.3.8 Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).</p>
<p>9. Demonstrate understanding of HIPAA rules in regard to confidentiality, privacy, and release of patient information. *</p>	<p><u>3.1 Customer Relations</u>: Apply techniques, strategies, and tools to develop, maintain and grow positive internal and external customer, or client, relationships. 3.1.5 Maintain confidentiality or privacy of internal and external customers. 3.1.10 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. <u>4.3 Compliance</u>: Develop compliance systems, processes and procedures used to manage compliance risk across an organization. 4.3.6 Analyze existing policies, procedures, and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability, and Accountability Act [HIPAA]) and self-regulatory guidelines.</p>
<p>10. Perform basic accounts receivable procedures to demonstrate familiarity with billing methods, insurance claims processing, and preparing bank deposits and account reconciliation. *</p>	<p><u>8.6 Medical Operations</u>: Develop foundational skills and knowledge to execute the operational processes in medical offices. 8.6.3 Prepare data for a referring physician. 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).</p>

	<p>8.6.9 Analyze and establish fee schedules and discounts.</p> <p>9.4 <u>Internal Controls</u>: Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.</p> <p>9.4.4 Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls).</p> <p>9.4.5 Inspect and ensure the continued functioning of internal controls.</p>
<p>11. Examine the impact that personal ethics and morals may have within a medical facility. *</p>	<p>1.1 <u>Employability Skills</u>: Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.</p> <p>1.1.6 Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community, and workplace roles.</p> <p>1.3 <u>Business Ethics and Law</u>: Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.</p> <p>1.3.3 Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).</p> <p>1.3.8 Verify compliance with computer and intellectual property laws and regulations.</p> <p>4.6 <u>Corporate Social Responsibility (CSR)</u>: Interpret, apply, and communicate an organization’s ethics and social responsibility policies and code of conduct in routine and ambiguous situations.</p> <p>4.6.2 Compare and contrast ethical challenges across industry sectors (e.g., healthcare, financial services, consumer products, manufacturing, retail) and functional areas (e.g., marketing, human resources, financial reporting).</p>
<p>12. Illustrate the importance of the separation of personal beliefs systems and professional ethics in the performance of duties in a medical facility. *</p>	<p>3.4 <u>Social Media Communications</u>: Apply tools, strategies, and processes to plan, create, implement, monitor, and evaluate social media communications to support corporate brand and strategy.</p> <p>3.4.2 Compare and contrast the use of social media for personal and business purposes.</p> <p>4.6 <u>Corporate Social Responsibility (CSR)</u>: Interpret, apply, and communicate an organization’s ethics and social responsibility policies and code of conduct in routine and ambiguous situations.</p> <p>4.6.2 Compare and contrast ethical challenges across industry sectors (e.g., healthcare, financial services, consumer products, manufacturing, retail) and functional areas (e.g., marketing, human resources, financial reporting).</p>