



# BROWARD COMMUNITY COLLEGE COURSE OUTLINE

**LAST REVIEW:** 2005-06

**NEXT REVIEW:** 2010-11

**STATUS:** A

**COURSE TITLE:** Administrative Office Procedures Lab

**COMMON COURSE NUMBER:** MEA 0334L

**CREDIT HOURS:** 1.5hrs

**CONTACT HOUR BREAKDOWN:**

*(per 16 week term)*

**CLOCK HOURS:** 48

Lecture:

Lab: 48

*(Voc. Course ONLY)*

Clinic:

Other:

**PREREQUISITE(S):**

**COREQUISITE(S):** MEA 0271

**PRE/COREQUISITE(S):** HSC 1531

**COURSE DESCRIPTION:** Laboratory portion of MEA 0271. Deals with financial management of the medical office. Basic accounting procedures consisting of pegboard, billing, collection, coding, payroll processing, banking and medical transcription application are included. Students will be provided with the opportunity to learn fundamentals of health insurance, practice in filling insurance claims, diagnostic and procedural coding, setting appointments, managing the medical record, processing mail and other financial responsibilities associated with the medical office. Discussion regarding the different types of insurance and manage care plans and general clerical functions will be included. Medico legal and ethical responsibilities regarding the financial aspects of the medical office will be studied. *(750 characters, maximum)*

## UNIT TITLES

1. Medico legal and ethical responsibilities
2. Telephone techniques
3. Appointments
4. The Medical Record
5. Filing procedures
6. Written Correspondence and Mail processing
7. Fees, Credits and Collection
8. Banking and Bookkeeping
9. Office Managerial responsibilities
10. The Health Insurance System
11. Principles of Medical Transcription



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## **UNITS**

### **Unit 1**

#### **General Outcome:**

##### **1.0 The student shall:**

1. List the different types of insurance available.
2. Define and understand the insurance terminology applicable to each area.
3. Identify the legal considerations, which apply to insurance filing.
4. Apply and perform the basic steps in coding diagnosis using the ICD-9 CM coding system.
5. Apply and perform the basic steps in coding medical procedures using the CPT-4 coding system.
6. Fill out the Universal Claim Form and the items required for proper filing.
7. List the basic differences between Medicare and Medicaid.
8. List the basic differences between Champus/Champva and the new Tricare.
9. List the basic differences between Worker's Compensation and Disability Compensation.
10. Complete a Universal Health Insurance Claim Form.
11. Describe the features of Blue-Cross/Blue-Shield basic benefits and discuss briefly the history of these.
12. Discuss professional fee determinations, and orient patients about their payment responsibilities and insurance reimbursement.
13. Perform the basics of accounting and banking as they relate to the medical office.
14. Perform the basic principles of payroll and identify the different forms needed.
15. List the different types of appointment scheduling and time management responsibility.
16. Use and maintain office equipment.

#### **General Outcome Cont:**



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17. Apply managed care policies and procedures.
18. Apply bookkeeping procedures
19. List medico-legal principles as they relate to the administrative aspects of the medical office.
20. Explain the different types of fees and insurance plans available to patients.
21. Understand the principles of written communications as they relate to the medical office.
23. Perform medical transcription.
24. List the basic principles of managing a medical office.



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## **Unit 1** Medico Legal and Ethical Responsibilities

### Role Delineation Components

Perform basic clerical functions  
Adhere to legal and ethical principles  
Use medical terminology  
Maintain confidentiality  
Adhere to HIPAA regulations

### **Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit, the student shall be able to:**

- 1.1 Define and use the legal terminology in this unit
- 1.2 State the difference between medical ethics and medical etiquette
- 1.3 Follow the steps necessary to obtain a consent form
- 1.4 Identify the contents of a release of information form
- 1.5 Identify two types of medical professional liability
- 1.6 Identify various types of contracts
- 1.7 Identify records that should be retained indefinitely
- 1.8 Identify the statute governing subpoena of records
- 1.9 Identify how to prevent medico legal claims



**Common Course Number: MEA 0334L**

**Unit 2** Telephone Procedures

Role Delineation Components

Perform basic clerical functions  
Understand and adhere to managed care policies and procedures  
Manage time efficiently  
Recognized and responds to emergencies  
Adhere to triage procedures  
Maintain confidentiality  
Use effective verbal communications  
Recognized and respond to verbal and non-verbal communications  
Document accurately  
Instruct individuals according to their needs  
Explain office policies and procedures  
Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit, the student shall be able to:**

- 2.1 Communicate over the telephone
- 2.2 Respond appropriately to callers who have specific needs
- 2.3 Identify different types of telephone systems
- 2.4 Perform the process of screening incoming telephone calls
- 2.5 Apply the components of a properly prepared telephone message
- 2.6 Place outgoing telephone calls, long distance calls and conference calls.
- 2.7 Apply the process of selecting an answering service



**Common Course Number: MEA 0334L**

**Unit 3** Appointments

Role Delineation Components

Perform basic clerical functions

Understand and adhere to managed care policies and procedures

Manage time efficiently

Adapt communications to individual's needs

Schedule, coordinate and monitor appointments, admissions and procedures

Document accurately

Maintain confidentiality

Apply computer techniques to support office operations

Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit the student will:**

- 3.1 Select an appropriate appointment book or system according to the medical office needs
- 3.2 Perform the process of making appointments
- 3.3 Identify the requirements for setting up pre-operative and post-operative appointments and procedures
- 3.4 Apply the various methods of scheduling appointments
- 3.5 List methods of handling problem appointments such as emergencies and difficult patients
- 3.6 Perform referral appointments



**Common Course Number: MEA 0334L**

**Unit 4** The Medical Record

Role Delineation Component

Perform basic clerical functions  
Coordinate patient care information with other health care providers  
Receive, organize, prioritize and transmit information  
Use medical terminology appropriately  
Document accurately  
Follow federal, state and local legal guidelines  
Prepare and maintain medical records  
Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit the student will:**

- 4.1 List reasons to maintain medical records
- 4.2 Identify the difference between medical records and medical reports
- 4.3 Identify three basic types of medical records systems
- 4.4 Perform two types of documentation formats
- 4.5 Know terms and common abbreviations associated with medical records reports and notes
- 4.6 Identify the contents of a patient's medical record file
- 4.7 Identify the contents of a history and physical examination report
- 4.8 Perform the process of correcting information in a medical record
- 4.9 Describe the operation of an electronic medical record system
- 4.10 Know terms and abbreviations pertaining to medications
- 4.11 Perform the process of documenting medication refills in the medical record
- 4.12 Create a medication log



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**Unit 5** Filing Procedures

Role Delineation Component

Use basic clerical functions  
Manage personnel benefits and maintain records  
Use Medical terminology appropriately  
Maintain confidentiality  
Prepare and maintain medical records  
Work as a team member  
Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit the student will:**

- 5.1 Identify the difference between the many different types of filing systems
- 5.2 List various reprographic methods used in record storage
- 5.3 Perform the filing process
- 5.4 Assemble equipment to set up a filing system
- 5.5 List the retention period for temporary and permanent records
- 5.6 List the filing units and indexing order to file a patient's medical record
- 5.7 List the components of a ticker file
- 5.8 State the principles of subject and numeric filing systems
- 5.9 State the standardized alphabetic rules for filing patient's medical records



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**Unit 6** Written Correspondence and Mail Processing

Role Delineation Components

Perform basic clerical functions

Work as a team member

Adapt to change

Use medical terminology appropriately

Prioritize and perform multiple tasks

Use electronic technology to receive, organize, prioritize, and transmit information

Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit the student will:**

- 6.1 Identify office equipment used in written communications and mail processing
- 6.2 Identify ergonomic factors that affect the medical assistant's work environment
- 6.3 Identify different letter formats and punctuation styles
- 6.4 Identify the parts of a letter
- 6.5 Identify the various options for purchasing postage
- 6.6 Identify how incoming mail is handled and sorted
- 6.7 Identify the characteristics of suspicious mail
- 6.8 Define the most economical classification for mailing various communications
- 6.9 Apply the proper editing and proofreading techniques
- 6.10 Identify the different types of memos and describe proper use
- 6.12 Identify the advantages of an electronic communications system for a medical practice
- 6.13 Identify the envelope address format following preferred US Postal Service regulations
- 6.14 Compose and prepare grammatically correct business correspondence
- 6.15 Demonstrate the proper functioning and usage of photocopying machines and fax machines



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## **Unit 7** Fees, Credits and Collection

### Role Delineation Components

Perform basic clerical functions  
Monitor third-party reimbursement  
Understand and adhere to managed care policies and procedures  
Manage accounts receivable  
Use medical terminology appropriately  
Serve as a liaison  
Promote the practice through positive public relations  
Document accurately  
Explain office policies and procedures  
Adhere to HIPAA regulations

### **Specific Measurable Learning Outcomes:**

#### **Upon successful completion of this unit the student will:**

- 7.1 Define the terminology associated with fees, credit and collection
- 7.2. Discuss fees with patients
- 7.3 Understand different fee policies and schedules
- 7.4 Understand billing methods
- 7.5 List the services of a credit bureau
- 7.6 Explain credit laws
- 7.7 Understand the components of establishing a financial agreement with a patient
- 7.8 Understand the steps for debt collection using the telephone
- 7.9 Discuss the process of selecting a collection agency
- 7.10 Perform the steps for posting, preparing and itemized bill statement and a patient's ledger card
- 7.11 Identify when to use small claims court
- 7.12 Compose an appropriate collection letter
- 7.13 Demonstrate the proper use of a calculator



**Common Course Number: MEA 0334L**

**Unit 8** Banking and Bookkeeping

Role Delineation Components

Document Accurately  
Determine needs for documentation and reporting  
Use manual bookkeeping systems  
Manage accounts Receivable  
Manage accounts payable  
Maintain records for accounting and banking purposes  
Manage Practice Finances  
Prioritize and perform multiple tasks  
Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit, the student will:**

- 8.1 Define common terminology associated with banking and bookkeeping
- 8.2 Identify the different types of checking accounts and bookkeeping systems
- 8.3 Recognize several types of checks.
- 8.4 Perform the process of posting NSF checks.
- 8.5 Perform the process of reconciling a bank statement.
- 8.6 List various methods of paying bills.
- 8.7 Identify the components of a pegboard bookkeeping system.
- 8.8 Perform day sheet entries
- 8.9 List the components of a ledger card and posting.
- 8.10 Identify the different types of endorsements
- 8.11 Prepare a check, bank deposit slip, and a ledger card
- 8.12 Perform the steps for reconciling a bank statement and complete a check register



**Common Course Number: MEA 0334L**

**Unit 9** Health Insurance System

Role Delineation Component

Perform basic clerical functions

Understand and apply third-party guidelines

Perform Procedural and diagnostic coding

Use Medical Terminology appropriately

Understand and adhere to managed care policies and procedures

Obtain reimbursement through accurate claims submission

Follow employer's established policies dealing with the health care contract

Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit, the student will:**

- 9.1 Define the terms associated with insurance
- 9.2 Perform the process of completing insurance claim forms (CMS- 1500) for Medicare, TRICARE and other health insurance plans
- 9.3 List the steps necessary to collect information from medical records to complete insurance claims forms
- 9.4 Identify and explain various insurance programs
- 9.5 Perform the steps to select appropriate diagnostic and procedural codes from the CPT-4 and the ICD-9 CM code books
- 9.6 List the process to complete a managed care authorization form



**Common Course Number: MEA 0334L**

**Unit 10** Principles of Medical Transcription

Role Delineation Components

Perform basic clerical functions

Apply computer techniques to support office operations

Perform Medical Transcription

Use Medical Terminology appropriately

Use effective and correct verbal and written communications

Receive, organize, prioritize, and transmit information

Adhere to HIPAA regulations

**Specific Measurable Learning Outcomes:**

**Upon successful completion of this unit, the student will:**

- 10.1** Demonstrate the steps necessary to properly operate transcription equipment
- 10.2** Transcribe a dictated document
- 10.3** Assemble a transcribed document