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Administrative MEDICAL ASSISTING

Linda L. French

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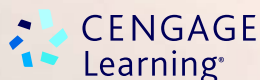


Administrative **MEDICAL ASSISTING**

Eighth Edition

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Eighth Edition****Linda L. French**SVP, GM Skills & Global Product Management:
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Money doesn't make people rich—knowledge makes people rich.
—Author unknown

We all need a *sounding board*; someone to run ideas by, help absorb the bumps in the road, and encourage us along life's journey. This edition is dedicated to my husband Dick, who has been my sounding board for the past 50 years. Without his words of encouragement, practical help, and hours of patient listening, I could not have completed this edition. My love and gratitude are eternal.

—Linda L. French, CMA (AAMA), NCICS, CPC

Always remember what you have learned.
Your education is your life—guard it well.
—Proverbs 4:13





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COMPREHENSIVE LIST OF PROCEDURES AND JOB SKILLS

The following Procedures appear in the *textbook* and Job Skills appear in the *Workbook*:

CHAPTER 1

A CAREER AS AN ADMINISTRATIVE MEDICAL ASSISTANT

Performance Objectives (Procedures) in This Textbook

- Procedure 1-1 Interpret and accurately spell medical terms and abbreviations

Performance Objectives (Job Skills) in the Workbook

- Job Skill 1-1 Interpret and accurately spell medical terms and abbreviations
- Job Skill 1-2 Use the Internet to look up key terms and hear pronunciations
- Job Skill 1-3 Prioritize a task list to practice time management skills
- Job Skill 1-4 Use the Internet to obtain information on certification or registration
- Job Skill 1-5 Use the Internet to test your knowledge of anatomy and physiology or medical terminology
- Job Skill 1-6 Develop a medical practice survey

CHAPTER 2

THE HEALTH CARE ENVIRONMENT: PAST, PRESENT, AND FUTURE

Performance Objectives (Procedures) in This Textbook

- Procedure 2-1 Direct patients to specific hospital departments
- Procedure 2-2 Refer patients to the correct physician specialist

Performance Objectives (Job Skills) in the Workbook

- Job Skill 2-1 Use the Internet to research and write an essay about a medical pioneer
- Job Skill 2-2 Direct patients to specific hospital departments
- Job Skill 2-3 Refer patients to the correct physician specialist
- Job Skill 2-4 Define abbreviations for health care professionals
- Job Skill 2-5 Determine basic skills needed by the administrative medical assistant

CHAPTER 3

MEDICOLEGAL AND ETHICAL RESPONSIBILITIES

Performance Objectives (Procedures) in This Textbook

- Procedure 3-1 Release patient information

Performance Objectives (Job Skills) in the Workbook

- Job Skill 3-1 List personal ethics and set professional ethical goals
- Job Skill 3-2 Complete an authorization form to release medical records
- Job Skill 3-3 Download state-specific scope of practice laws and determine parameters for a medical assistant
- Job Skill 3-4 Compose a letter of withdrawal
- Job Skill 3-5 View a MedWatch online form and learn submitting requirements
- Job Skill 3-6 Print the *Patient Care Partnership* online brochure and apply it to the medical office setting
- Job Skill 3-7 Download and compare state-specific advance directives

CHAPTER 4

The Art of Communication

Performance Objectives (Procedures) in This Textbook

- Procedure 4-1 Demonstrate active listening by following guidelines
- Procedure 4-2 Communicate with children
- Procedure 4-3 Communicate with older adults
- Procedure 4-4 Communicate with hearing-impaired patients
- Procedure 4-5 Communicate with visually impaired patients
- Procedure 4-6 Communicate with speech-impaired patients
- Procedure 4-7 Communicate with patients who have an impaired level of understanding
- Procedure 4-8 Communicate with anxious patients
- Procedure 4-9 Communicate with angry patients
- Procedure 4-10 Communicate with patients and their family members and friends
- Procedure 4-11 Communicate with the health care team

Performance Objectives (Job Skills) in the Workbook

- Job Skill 4-1 Demonstrate body language
- Job Skill 4-2 Use the Internet to research active listening skills and write a report
- Job Skill 4-3 Communicate with a child via role-playing
- Job Skill 4-4 Communicate with an older adult via role-playing
- Job Skill 4-5 Name unique qualities of other cultures
- Job Skill 4-6 Communicate with a hearing-impaired patient via role-playing
- Job Skill 4-7 Communicate with a visually impaired patient via role-playing
- Job Skill 4-8 Communicate with a speech-impaired patient via role-playing
- Job Skill 4-9 Communicate with a patient who has an impaired level of understanding via role-playing
- Job Skill 4-10 Communicate with an anxious patient via role-playing
- Job Skill 4-11 Communicate with an angry patient via role-playing
- Job Skill 4-12 Communicate with a patient and his or her family members and friends via role-playing
- Job Skill 4-13 Communicate with a coworker on the health care team via role-playing

CHAPTER 5

RECEPTIONIST AND THE MEDICAL OFFICE ENVIRONMENT

Performance Objectives (Procedures) in This Textbook

- Procedure 5-1 Open the medical office
- Procedure 5-2 Assist patients with in-office registration procedures
- Procedure 5-3 Assist patient in preparing an application form for a disabled person placard
- Procedure 5-4 Develop a list of community resources
- Procedure 5-5 Develop a patient education plan for diseases or injuries related to the medical specialty
- Procedure 5-6 Work at a computer station and comply with ergonomic standards
- Procedure 5-7 Prevent and prepare for fires in the workplace
- Procedure 5-8 Learn how and when to use a fire extinguisher
- Procedure 5-9 Develop an emergency disaster plan
- Procedure 5-10 Close the medical office

Performance Objectives (Job Skills) in the Workbook

- Job Skill 5-1 Prepare a patient registration form
- Job Skill 5-2 Prepare an application form for a disabled person placard
- Job Skill 5-3 Research community resources for patient referrals and patient education
- Job Skill 5-4 Assess and use proper body mechanics
- Job Skill 5-5 Evaluate the work or school environment and develop a safety plan
- Job Skill 5-6 Take steps to prevent and prepare for fires in a health care setting
- Job Skill 5-7 Demonstrate proper use of a fire extinguisher
- Job Skill 5-8 Determine potential disaster hazards in your local community
- Job Skill 5-9 Develop an emergency response template with an evacuation plan

CHAPTER 6

TELEPHONE PROCEDURES

Performance Objectives (Procedures) in This Textbook

- Procedure 6-1 Prepare and leave a voice mail message
- Procedure 6-2 Take messages from an answering service

- Procedure 6-3 Answer incoming telephone calls
- Procedure 6-4 Place outgoing telephone calls
- Procedure 6-5 Screen telephone calls
- Procedure 6-6 Identify and manage emergency calls
- Procedure 6-7 Handle a complaint from an angry caller

Performance Objectives (Job Skills) in the Workbook

- Job Skill 6-1 Screen incoming telephone calls
- Job Skill 6-2 Prepare telephone message forms
- Job Skill 6-3 Document telephone messages and physician responses
- Job Skill 6-4 Role-play emergency telephone scenario(s)

CHAPTER 7

APPOINTMENTS

Performance Objectives (Procedures) in This Textbook

- Procedure 7-1 Prepare an appointment matrix
- Procedure 7-2 Execute appointment procedures
- Procedure 7-3 Schedule appointments in a paper-based system
- Procedure 7-4 Schedule electronic appointments
- Procedure 7-5 Reorganize patients in an emergency situation
- Procedure 7-6 Schedule surgery, complete form, and notify the patient
- Procedure 7-7 Schedule an outpatient diagnostic test

Performance Objectives (Job Skills) in the Workbook

- Job Skill 7-1 Set up appointment matrix
- Job Skill 7-2 Schedule appointments
- Job Skill 7-3 Prepare an appointment reference sheet
- Job Skill 7-4 Complete appointment cards
- Job Skill 7-5 Abstract information and complete a hospital/surgery scheduling form
- Job Skill 7-6 Transfer surgery scheduling information to a form letter
- Job Skill 7-7 Complete requisition forms to schedule outpatient diagnostic tests

CHAPTER 8

FILING PROCEDURES

Performance Objectives (Procedures) in This Textbook

- Procedure 8-1 Set up an email filing system
- Procedure 8-2 File using a subject filing system
- Procedure 8-3 Organize a tickler file

- Procedure 8-4 Determine filing units and indexing order to alphabetically file a patient's medical record
- Procedure 8-5 Label and color-code patient charts
- Procedure 8-6 Prepare, sort, and file documents in patient records
- Procedure 8-7 Locate a misfiled medical record file folder

Performance Objectives (Job Skills) in the Workbook

- Job Skill 8-1 Determine filing units
- Job Skill 8-2 Index and file names alphabetically
- Job Skill 8-3 File patient and business names alphabetically
- Job Skill 8-4 Index names on file folder labels and arrange file cards in alphabetical order
- Job Skill 8-5 Color-code file cards

CHAPTER 9

MEDICAL RECORDS

Performance Objectives (Procedures) in This Textbook

- Procedure 9-1 Prepare and compile a medical record for a new patient
- Procedure 9-2 Follow documentation guidelines to record information in a medical record
- Procedure 9-3 Correct a medical record
- Procedure 9-4 Abstract data from a medical record

Performance Objectives (Job Skills) in the Workbook

- Job Skill 9-1 Prepare a patient record and insert progress notes
- Job Skill 9-2 Prepare a patient record and format chart notes
- Job Skill 9-3 Correct a medical record
- Job Skill 9-4 Abstract from a medical record
- Job Skill 9-5 Prepare a history and physical (H & P) report
- Job Skill 9-6 Record test results on a flow sheet

CHAPTER 10

DRUG AND PRESCRIPTION RECORDS

Performance Objectives (Procedures) in This Textbook

- Procedure 10-1 Use a drug reference book to spell and locate drug information
- Procedure 10-2 Read and interpret a written prescription
- Procedure 10-3 Record medication in a patient's medical record and on a medication log

Performance Objectives (Job Skills) in the Workbook

- Job Skill 10-1 Spell drug names
- Job Skill 10-2 Determine the correct spelling of drug names
- Job Skill 10-3 Use a drug reference book to locate information
- Job Skill 10-4 Translate prescriptions
- Job Skill 10-5 Record prescription refills in medical records
- Job Skill 10-6 Write a prescription
- Job Skill 10-7 Interpret a medication log
- Job Skill 10-8 Record on a medication schedule

CHAPTER 11

WRITTEN CORRESPONDENCE

Performance Objectives (Procedures) in This Textbook

- Procedure 11-1 Compose, format, key, proofread, and print business correspondence
- Procedure 11-2 Proofread a business document
- Procedure 11-3 Transcribe a dictated document
- Procedure 11-4 Prepare documents for photocopying

Performance Objectives (Job Skills) in the Workbook

- Job Skill 11-1 Spell medical words
- Job Skill 11-2 Key a letter of withdrawal
- Job Skill 11-3 Edit written communication
- Job Skill 11-4 Compose and key a letter for a failed appointment
- Job Skill 11-5 Compose and key a letter for an initial visit
- Job Skill 11-6 Compose and key a letter to another physician
- Job Skill 11-7 Compose and key a letter requesting payment
- Job Skill 11-8 Key two interoffice memorandums
- Job Skill 11-9 Abstract information from a medical record; compose and key a letter
- Job Skill 11-10 Key a two-page letter

CHAPTER 12

PROCESSING MAIL AND ELECTRONIC CORRESPONDENCE

Performance Objectives (Procedures) in This Textbook

- Procedure 12-1 Operate a postage meter machine
- Procedure 12-2 Follow safety guidelines when handling large volumes of mail and suspicious mail pieces

- Procedure 12-3 Open, sort, and annotate mail
- Procedure 12-4 Prepare outgoing mail
- Procedure 12-5 Complete Certified Mail and Return Receipt U.S. Postal Service forms
- Procedure 12-6 Address a business envelope using U. S. Postal Service regulations
- Procedure 12-7 Manage office mail
- Procedure 12-8 Compose an email message
- Procedure 12-9 Prepare a fax cover sheet and send a fax

Performance Objectives (Job Skills) in the Workbook

- Job Skill 12-1 Process incoming mail
- Job Skill 12-2 Annotate mail
- Job Skill 12-3 Classify outgoing mail
- Job Skill 12-4 Address small envelopes for OCR scanning
- Job Skill 12-5 Complete a mail-order form for postal supplies
- Job Skill 12-6 Compose a letter and prepare an envelope for Certified Mail
- Job Skill 12-7 Key and fold an original letter; address a small envelope for Certified Mail, Return Receipt requested
- Job Skill 12-8 Key and fold an original letter; address a large envelope for Certified Mail, Return Receipt requested
- Job Skill 12-9 Prepare a cover sheet for fax transmission

CHAPTER 13

THE REVENUE CYCLE: FEES, CREDIT, AND COLLECTION

Performance Objectives (Procedures) in This Textbook

- Procedure 13-1 Explain professional fees in an itemized billing statement
- Procedure 13-2 Separate and prepare monthly itemized billing statements
- Procedure 13-3 Establish a financial agreement with a patient
- Procedure 13-4 Perform debt collection using a telephone
- Procedure 13-5 Select a collection agency
- Procedure 13-6 Take collection action; send an account to a collection agency
- Procedure 13-7 File an uncollectible account in small-claims court
- Procedure 13-8 Trace a skip

Performance Objectives (Job Skills) in the Workbook

- Job Skill 13-1 Use a physician's fee schedule to determine correct fees
- Job Skill 13-2 Complete cash receipts
- Job Skill 13-3 Interpret an explanation of benefits form
- Job Skill 13-4 Role-play collection scenarios
- Job Skill 13-5 Compose a collection letter and prepare an envelope
- Job Skill 13-6 Complete a financial agreement

CHAPTER 14**BANKING****Performance Objectives (Procedures) in This Textbook**

- Procedure 14-1 Prepare a bank deposit
- Procedure 14-2 Write a check using proper format and calculate a running balance
- Procedure 14-3 Reconcile a bank statement

Performance Objectives (Job Skills) in the Workbook

- Job Skill 14-1 Prepare a bank deposit
- Job Skill 14-2 Write checks
- Job Skill 14-3 Endorse a check
- Job Skill 14-4 Inspect a check
- Job Skill 14-5 Reconcile a bank statement

CHAPTER 15**BOOKKEEPING****Performance Objectives (Procedures) in This Textbook**

- Procedure 15-1 Prepare and post to a patient's account
- Procedure 15-2 Prepare the pegboard; post charges, payments, and adjustments; and balance the day sheet
- Procedure 15-3 Establish, record, balance, and replenish the petty cash fund

Performance Objectives (Job Skills) in the Workbook

- Job Skill 15-1 Post entries to ledger cards and calculate balances
- Job Skill 15-2 Prepare ledger cards
- Job Skill 15-3 Bookkeeping Day 1—Post to patient ledger cards and prepare cash receipts
- Job Skill 15-4 Bookkeeping Day 1—Prepare the daily journal
- Job Skill 15-5 Bookkeeping Day 1—Post charges, payments, and adjustments using a daily journal

- Job Skill 15-6 Bookkeeping Day 1—Balance the day sheet
- Job Skill 15-7 Bookkeeping Day 2—Prepare the daily journal
- Job Skill 15-8 Bookkeeping Day 2—Post charges, payments, and adjustments to patient ledger cards and to the daily journal; prepare cash receipts and the bank deposit
- Job Skill 15-9 Bookkeeping Day 2—Balance the day sheet
- Job Skill 15-10 Bookkeeping Day 3—Prepare the daily journal
- Job Skill 15-11 Bookkeeping Day 3—Post charges, payments, and adjustments to patient ledger cards and to the daily journal; prepare cash receipts and the bank deposit
- Job Skill 15-12 Bookkeeping Day 3—Balance the day sheet
- Job Skill 15-13 Set up the day sheet for a new month

CHAPTER 16**PROCEDURE CODING****Performance Objectives (Procedures) in This Textbook**

- Procedure 16-1 Select correct procedure codes
- Procedure 16-2 Determine code selection from an operative report

Performance Objectives (Job Skills) in the Workbook

- Job Skill 16-1 Review *Current Procedural Terminology* codebook sections
- Job Skill 16-2 Code evaluation and management services
- Job Skill 16-3 Code surgical services and procedures
- Job Skill 16-4 Code radiology and laboratory services and procedures
- Job Skill 16-5 Code procedures and services in the Medicine section
- Job Skill 16-6 Code clinical examples

CHAPTER 17**DIAGNOSTIC CODING****Performance Objectives (Procedures) in This Textbook**

- Procedure 17-1 Select correct diagnostic codes using *ICD-10-CM*
- Procedure 17-2 Select burn and corrosion codes
- Procedure 17-3 Select diagnostic codes from the Table of Drugs and Chemicals

Performance Objectives (Job Skills) in the Workbook

- Job Skill 17-1 Code diagnoses from Chapters 1, 2, 3, 4, and 5 in *ICD-10-CM*
- Job Skill 17-2 Code diagnoses from Chapters 6, 7, 8, 9, and 10 in *ICD-10-CM*
- Job Skill 17-3 Code diagnoses from Chapters 11, 12, 13, 14, and 15 in *ICD-10-CM*
- Job Skill 17-4 Code diagnoses from Chapters 16, 17, 18, 19, and 20 in *ICD-10-CM*
- Job Skill 17-5 Code diagnoses from Chapter 21 and the Table of Drugs and Chemicals in *ICD-10-CM*
- Job Skill 17-6 Code diagnoses from chart notes using *ICD-10-CM*

CHAPTER 18**HEALTH INSURANCE SYSTEMS AND CLAIM SUBMISSION****Performance Objectives (Procedures) in This Textbook**

- Procedure 18-1 Verify insurance coverage
- Procedure 18-2 Complete the CMS-1500 Health Insurance Claim Form using OCR guidelines
- Procedure 18-3 Complete an Advance Beneficiary Notice form (ABN)

Performance Objectives (Job Skills) in the Workbook

- Job Skill 18-1 Complete a managed care authorization form
- Job Skill 18-2 Complete a health insurance claim form for a commercial case
- Job Skill 18-3 Complete a health insurance claim form for a Medicare case
- Job Skill 18-4 Complete a health insurance claim form for a TRICARE case

CHAPTER 19**OFFICE MANAGERIAL RESPONSIBILITIES****Performance Objectives (Procedures) in This Textbook**

- Procedure 19-1 Develop a complaint protocol
- Procedure 19-2 Setup a staff meeting
- Procedure 19-3 Prepare a staff meeting agenda
- Procedure 19-4 Develop and maintain an employee handbook
- Procedure 19-5 Prepare an incident report
- Procedure 19-6 Compile and maintain an office policies and procedures manual
- Procedure 19-7 Recruit an employee

- Procedure 19-8 Orient a new employee
- Procedure 19-9 Manage equipment maintenance
- Procedure 19-10 Prepare an order form
- Procedure 19-11 Pay an invoice
- Procedure 19-12 Establish and maintain inventory
- Procedure 19-13 Prepare a travel expense report

Performance Objectives (Job Skills) in the Workbook

- Job Skill 19-1 Document patient complaints and determine actions to resolve problems
- Job Skill 19-2 Write an agenda for an office meeting
- Job Skill 19-3 Prepare material for an office procedures manual
- Job Skill 19-4 Perform inventory control and keep an equipment maintenance log
- Job Skill 19-5 Abstract data from a catalogue and key an order form
- Job Skill 19-6 Complete an order form for office supplies
- Job Skill 19-7 Perform mathematic calculations of an office manager
- Job Skill 19-8 Prepare two order forms
- Job Skill 19-9 Prepare a travel expense report

CHAPTER 20**FINANCIAL MANAGEMENT OF THE MEDICAL PRACTICE****Performance Objectives (Procedures) in This Textbook**

- Procedure 20-1 Create headings and post entries in an accounts payable system; write checks
- Procedure 20-2 Create category headings, determine deductions, calculate payroll, and make entries to a payroll register

Performance Objectives (Job Skills) in the Workbook

- Job Skill 20-1 Perform accounts payable functions: write checks and record disbursements
- Job Skill 20-2 Pay bills and record expenditures
- Job Skill 20-3 Replenish and balance the petty cash fund
- Job Skill 20-4 Balance a check register
- Job Skill 20-5 Reconcile a bank statement
- Job Skill 20-6 Prepare payroll
- Job Skill 20-7 Complete a payroll register
- Job Skill 20-8 Complete an employee earning record
- Job Skill 20-9 Complete an employee's withholding allowance certificate
- Job Skill 20-10 Complete an employee benefit form



PREFACE

When I started preparations for the revision of *Administrative Medical Assisting*, eighth edition, I adopted the following quote by William Arthur Ward:

Four Steps to Achievement

Plan purposefully

Prepare prayerfully

Proceed positively

Pursue persistently

I read this quote every morning and took to heart each step as I worked to make this edition the very best! My goals were to streamline the content in order to simplify the learning path, highlight electronic components that are now a part of the medical office, and include all skills needed by an administrative medical assistant—all while focusing on the “heart of the health care professional” who works with compassion and sensitivity while tending to the needs of patients.

In the eighth edition, an emphasis has been placed on the **electronic health record** (EHR) and a new icon has been added to identify chapter-specific content. The **health care reform** (HCR) icon remains throughout the text with updated legislative actions and implementation dates. The continued development of additional critical thinking presented in real-life scenarios helps cultivate problem-solving skills. Materials needed and referred to for Job Skills in the *Workbook* are now presented in a concise easy-to-follow list.

DEVELOPMENT OF THIS TEXT

The longevity of this award-winning *textbook*, which has been in publication for 34 years,

speaks of the excellence of its founding authors, Marilyn T. Fordney and Joan J. Follis, whose great dedication, perseverance, and vision for the future role of the medical assistant helped create a working tool out of a classroom syllabus at Ventura College, California. This book has been used to expand knowledge and understanding, teach practical skills used by medical assistants all across America, as well as increase productivity in medical offices. While being mentored by these two great authors, my role has grown from a contributing author in the fourth edition, to coauthor in the fifth edition, and then becoming a primary author in the sixth, seventh, and eighth editions.

COMPETENCY-BASED LEARNING

Curriculum competencies and standards define the role and responsibilities of an administrative medical assistant, and certification tasks and test parameters help students understand topics and areas to study. Educational components for each of the following are presented in Appendix B of the *textbook* where cross-reference tables may be found that refer individual competencies to chapters and assignments within the text:

- American Medical Technologists (AMT) Medical Assisting Task List for the Registered Medical Assistant (RMA)
- Commission on Allied Health Education Programs (CAAHEP) Educational Competencies
- Accrediting Bureau of Health Education Schools (ABHES) Curriculum Competencies

- Certified Medical Assistants (CMA [AAMA]) Certification Examination Content
- Registered Medical Assistants (RMA [AMT]) Certification Examination Competencies
- Certified Medical Administrative Specialist (CMAS [AMT]) Examination Specifications

WHO IS THIS TEXT DESIGNED FOR?

The *textbook* material is designed for the learner who plans to work as an administrative (front-office) medical assistant in a private physician's office, single- or multiple-specialty clinic, or hospital setting; however, the skills presented also apply to other technicians and assistants who perform clerical functions similar to those of an administrative medical assistant.

The book can be used in community colleges, vocational and commercial educational institutions, welfare-to-work programs, and in-service training in the private medical office. It is an appropriate textbook for a one- or two-semester course. It may be used for self-study if no formal classes are available in the community or if a medical assistant wants to increase his or her skills but is unable to attend classes. Finally, the book serves as a reference for the working medical assistant, featuring the most up-to-date methods of performing medical office tasks.

ORGANIZATION OF THE TEXT

The *textbook* and *Workbook* chapters are arranged to better facilitate learning with legal and electronic health record information integrated throughout. The chapters are divided into seven units that progress from professional and career responsibilities, interpersonal communications, records management, written communications, financial administration, and managing the medical office to the final unit, where the learner prepares for employment.

NEW TO THIS EDITION

- **Chapter 1**, *A Career as an Administrative Medical Assistant*, now includes content about job outlook and externship folded in from Chapter 21.
- **Chapter 2**, *The Health Care Environment: Past, Present, and Future*, contains new content on electronic laboratory reports, medical pioneers, and telemedicine. Content has been moved from Chapter 16 that encompasses types of managed care organizations; precertification, predetermination, and preauthorization; as well as patient referrals, medical review, and nonphysician providers. Content moved from Chapter 21 includes global influences on health care and goals to improve health care internationally.
- **Chapter 8**, *Filing Procedures*, has been simplified and rearranged to decrease information on paper-based filing and includes the following new sections on an electronic filing system: Creating electronic documents, preserving computerized reports, maintaining email files, backing up computer files, and electronic confidentiality guidelines, security, and tickler files, along with a record retention schedule.
- **Chapter 9**, *Medical Records*, has been reorganized with the paper-based system de-emphasized and the EMR system brought to the forefront. Computerized provider order entry (CPOE), cloning of medical records, and meaningful use sections are expanded and new content appears on medical scribes, various types of medical reports, medical record access and backup, Medicare documentation guidelines, as well as outside tests and test results. There are new compliance boxes, examples, figures, and exam-style review questions.
- **Chapter 13**, *The Revenue Cycle: Fees, Credit and Collection*, has been renamed to emphasize features of the revenue cycle and reorganized to include all items that address "fees" (e.g., assignment, coinsurance payment, and participating/nonparticipating physicians); these have been relocated from Chapter 16. New sections include the sliding fee schedule, online payment, receiving payment, and explanation of benefits including the Medicare Remittance Advice and Medicare Summary Notice. The section on "Billing" has been renamed to "Patient Billing" in order to differentiate it from "Insurance Billing" in Chapter 18. All content having to do with posting procedures has been moved to Chapter 15, *Bookkeeping*. The "History of Credit" has been moved to the end of the chapter, prior to "History of Credit Laws."

- **Chapter 15**, *Bookkeeping*, now includes all related posting content (moved from Chapters 13 and 14) with five new examples, a new figure, and two new exam-style questions.
- **Chapter 16**, *Procedure Coding*, has been split off from Chapter 17—*Diagnostic Coding*. New items include: Learning objectives, procedure (Determine Code Selections from an Operative Report), 13 key terms, table on observation status, six examples, stop and think scenario, and six exam-style questions. New sections include: Encoders, hospital admits and observation status, and how to code from an operative report. The table on modifiers has been reconfigured, reduced, and updated.
- **Chapter 17**, *Diagnostic Coding*, has been reorganized with a focus on coding all chapters in *ICD-10-CM*. It has the following new items: Five objectives, a procedure (Select Diagnostic Codes from the Table of Drugs and Chemicals), six key terms, nine codebook terms, two compliance boxes, two examples, and new sections that include: The encounter form, encoders and computer-assisted coding, codebook official guidelines, principal versus primary diagnosis, linking codes for medical necessity, code edits and audits, combination codes, the alphabetic index (Volume II), the tabular list (Volume I), chapter-specific coding guidelines, and myocardial infarction.
- **Chapter 18**, *Health Insurance Systems and Claim Submission*, has five new figures depicting insurance cards for private insurance, Medicaid, Part D prescription drugs, TRICARE, and CHAMPVA. It also includes a new table on the type of health insurance coverage in the United States, a major update on Health Care Reform, and two new procedures (18-1, Verify Insurance Coverage and 18-3, Complete an Advance Beneficiary Notice). The bulk of information on managed care has been moved to Chapter 2, and information on methods of payment, the physician's fee schedule, UCR payments, relative value studies, the physician's fee profile, and capitation has been moved to Chapter 13. New sections include: Health insurance identification card, provider contracts, Genetic Information Nondiscrimination Act, Medicare National and Local Coverage Determinations, Physician Quality Reporting System, senior-assisted

programs, insurance-related identification numbers, claim adjudication and payment, comprehensive error rate testing program, recovery audit contractor review, unprocessed claims, missing and incorrect information, and unpaid or denied claims.

CONTENT FEATURES

New features are preceded by an asterisk (*).

- ***Chapter content** is updated in all chapters to reflect changes in competency requirements, technology, job responsibilities, insurance regulations, legal directives, and compliance mandates.
- **Objectives** are divided into (1) Learning Objectives that state chapter goals, (2) Performance Objectives in the *textbook* that contain a numbered list of step-by-step procedures, and (3) Performance Objectives for the *Workbook* containing a numbered list of Job Skills, provided as an opportunity for practice.
- **Customer service** is emphasized at the beginning of each chapter in a section titled *Heart of the Health Care Professional*.
- ***Key terms** introduce the student to basic terminology at the beginning of each chapter and are listed throughout the chapter in bold, colored type, with expanded definitions in the glossary at the end of the textbook. Multiple key terms have been added to reflect current trends in terminology.
- ***Italicized terms** have been included throughout the text to emphasize additional terms that are routinely used in today's health care profession and competency language. These terms are also listed in the index to help ease finding key topics.
- ***Photographs** visually support textual content and give the learner a better perspective of the office duties and situations mentioned. New photos are found in Chapters 1, 2, 4, 8 and 13.
- ***Icons** give quick reference to Customer Service applications, Compliance issues, Health Care Reform, Patient Education boxes, Procedures, Stop and Think Case Scenarios, Summary of Certification Topics, Exam-Style Review Questions, Workbook Assignments, and Resources. An icon for the Electronic Health Record (EHR) has been added within the chapter material for this edition to help

the reader locate content related to today's electronic medical office.

- ***Compliance issues** mandated by the federal government are emphasized by a color-screened box with an icon for quick identification. New boxes occur in Chapters 9, 12, 13, and 17. Each is titled and many cite HIPAA regulations.
- ***Patient Education boxes** describe how the medical assistant should keep the patient informed. New boxes occur in Chapters 3 and 4; each is titled and indexed to help locate various types of educational situations.
- ***Figures, tables, and examples**, enhanced in full color, present information in a succinct, easy-to-understand format.

New Figures may be found in Chapter 9, (sample letter from a medical clinic advising patients about a new EHR system) and Chapter 15 (practice management software system screenshot).

New or Enhanced Tables may be found throughout the *textbook*, which provide an orderly arrangement of detailed data.

New Examples (#18) are titled and indexed and each of these components is numbered for easy reference. These aids are referred to throughout each chapter to clarify concepts, illustrate graphics, and depict realistic scenarios.

INSTRUCTIONAL FEATURES

New features are preceded by an asterisk (*).

- ***Procedures** include step-by-step directions for completing tasks in the medical office. Each is numbered and listed at the beginning of each chapter, and many are cross-referenced to be referred to while completing Job Skills in the *Workbook*. New procedures have been added to Chapters 7, 15, 16, 17, and 18; others have been enhanced totaling over 100 procedures.
- ***Critical Thinking Component** is presented in Stop and Think Case Scenarios, which appear at the end of each chapter. These questions help stimulate the thought process and exercise reasoning skills. New scenarios may be found in Chapters 2, 5, 6, 7, and 16. (Answers are found in the *Instructor Resources*.)
- **Focus on Certification** summarizes the key areas of study for students who are preparing to take the CMA (AAMA), RMA (AMT), or CMAS (AMT) certification exams.

- ***Exam-Style Review Questions** offer a quick review of key points in the same multiple-choice format as seen on certification examinations. New questions have been added and others revised. (Answers are found in the *Instructor Resources*.)

- ***Workbook Assignments** are divided into:

(1) *Review Questions*, which include all major topics. New questions have been added to multiple chapters and others have been rewritten and/or reordered to follow chapter material.

(2) *Critical Thinking Exercises*, which stimulate reasoning capabilities. Ten new telephone role-playing scenarios have been added to Chapter 6; other new questions appear in Chapters 2 and 3.

(3) *Job Skills*, which offer step-by-step directions and hands-on practice for all major tasks an administrative medical assistant performs. The materials needed and referred to under "Conditions" now appear in a bulleted list for easy reference. (Answers are found in the *Instructor Resources*.)

- ***Resources**, listed at the end of each chapter, have been updated and include booklets, books, medical directives, newsletters, professional magazines, and organizations pertinent to each chapter topic. Most Internet site addresses have been eliminated due to frequent changes and instead "Search for" suggestions have been added.
- ***CMS-1500 Claim Form Instructions and Templates**, found in Appendix A, offer a quick reference. A template of the new CMS-1500 form (02/12) is shown as well as each field, with updated instructions for commercial payers, Medicare (Medicare/Medicaid, Medicare/Medigap, MSP), and TRICARE.

LEARNING PACKAGE

Workbook ISBN 978-1-305-85918-0

There is great synergy between the *textbook* and the *Workbook*, which is an essential resource available for use. A realistic approach is experienced as the student assumes that he or she is employed by two physicians who are married to each other and who share a professional corporation. Through job skill exercises, the student, assuming the role of the administrative medical assistant, performs a variety of duties that are a realistic part of the day-by-day activities in the joint office of a

general practitioner and a family practitioner. Following, major changes are listed in a brief section on “What is new to this edition” and a list of features. New features are preceded by an asterisk (*).

New to This Edition of the Workbook

- **Chapter 13, *The Revenue Cycle: Fees, Credit, and Collection***, has been modified so that all posting exercises are now located in Chapter 15, *Bookkeeping*.
- **Chapter 16, *Procedure Coding***, contains new review questions to reinforce new material.
- **Chapter 17, *Diagnostic Coding***, has 18 new review questions and a new job skill—Code from Chart Notes.
- **Editable PDFs of the Blank Forms** are now found exclusively online. These Blank Forms are realistic and similar to those found in medical offices; they are necessary to complete a variety of job skill exercises found in the *Workbook*. They can be found on the free Student Companion site accompanying this *textbook* by going to www.cengagebrain.com and searching either by author and title (French *Administrative Medical Assistant*, eighth edition) or by ISBN (9781305859173). Once accessed, the forms can be downloaded and completed electronically or printed and filled out manually.

Part I

- **Abbreviation and Spelling Review** incorporates medical terminology into a short chart note for each chapter, giving learners an opportunity to write definitions for abbreviations and spell medical terms. (Answers are found in the online *Instructor Resources*.)
- ***Review Questions** cover key points in chapters, address areas not covered in the Exam-Style Review Questions in the text, and are presented in various formats to increase learning. New questions have been added and others reordered to follow the content. (Answers are found in the online *Instructor Resources*.)
- ***Critical Thinking Exercises** offer learners an opportunity to address situations and solve problems that are realistic to an office setting. New questions have been added to various chapters. (Answers are found in the online *Instructor Resources*.)

- ***Job Skill** exercises offer students experience as they practice tasks realistic to the medical office. Step-by-step directions incorporate *Performance Evaluation Checklists* so students and instructors have both detailed directions and the checklist in the same area. The student has three attempts to complete each job skill and points have been assigned proportionate to the time and effort the student spends completing the exercise and performing the skill. Job Skill interactive forms are now located on the student/instructor companion website at www.cengagebrain.com. There are over 150 job skills and each one is cross-referenced to CAAHEP and ABHES competencies. (Answers are found in the online *Instructor Resources*.)

Appendices

- **Appendix A** for Praxton Medical Group, Inc., lists references for the simulated medical practice and states office policies to be followed while completing exercises and making decisions that relate to the operations of a medical office. A **mock fee schedule** with procedure codes that are organized according to sections in the CPT codebook include descriptions of services and fees followed by CPT modifiers and a small selection of HCPCS Level II codes with descriptions and fees.
- **Appendix B: List of Abbreviations** includes all abbreviation tables found in the text in one location.

Student Companion Website

(www.cengagebrain.com)

This student website provides students with the editable PDF Blank Forms needed to complete many of the activities in the *Workbook*. Chapter 21: Seeking a Position as an Administrative Medical Assistant is provided as a valuable online supplement to the text. Students can also access comprehensive support slides created in Microsoft PowerPoint to use in study and review.

MindTap to Accompany *Administrative Medical Assisting, Eighth Edition*

MindTap is a fully online, interactive learning experience built upon authoritative Cengage Learning content. By combining readings, multimedia, activities, and assessments into a singular learning path, MindTap

elevates learning by providing real-world application to better engage students. Instructors customize the learning path by selecting Cengage Learning resources and adding their own content via apps that integrate into the MindTap framework seamlessly with many learning management systems.

The guided learning path demonstrates the importance of the medical assistant through engagement activities and interactive exercises. Learners can apply their understanding of the material through interactive activities taken from Critical Thinking Challenge 3.0 and the Medical Assisting Learning Lab, in addition to quizzing, certification-style assessments, and case studies. These simulations elevate the study of medical assisting by challenging students to apply concepts to practice. Videos from the Medical Assisting Video series are incorporated to demonstrate key skills correctly in a dynamic and engaging way. Additional resources including Online Job Skills, flashcards, transcription tapes, and self-review make MindTap the most comprehensive package for Administrative Medical Assisting instruction and learning.

To learn more, visit www.cengage.com/mindtap.

INSTRUCTIONAL PACKAGE

Instructor Companion Site

Deliver powerful lectures, create lesson plans, customize exams, and monitor student progress throughout the course with the tools provided on the online *Instructor Companion Site*. Access the *Instructor Companion Site* at www.cengagebrain.com, and use your Cengage Learning faculty account to log in. Once inside, add the *textbook* to your dashboard to view these resources:

- Customize the **electronic Instructor Manual files** to individual class needs.
- Deliver effective presentations with chapter **presentations in Microsoft PowerPoint**.
- Create quizzes and tests to monitor student progress with the **Computerized Test Bank**, which can be delivered through your school's learning management system, provided as paper tests, or integrated and delivered right through MindTap.
- Complete *Curriculum* with detailed lesson outlines for each Unit.
- Access to all Student Resources.

Electronic Instructor's Manual

An *Electronic Instructors Manual* is available on the Instructor Companion Site for use with this *textbook*, offering the following features. New features are preceded by an asterisk (*).

- **General Instructions** cover materials and equipment, audiovisual aids, instructor resources, online companion website features, competency-based learning, job skill competency checklists with automated grading and correcting using grading software programs,* updated competency tables, outline and contents of the course, student evaluation, and evaluation of course and instructor.

Section I: Textbook and Workbook Answer Key

Each chapter contains:

- ***CAAHEP Areas of Competence** listed according to the Cognitive, Psychomotor, and Affective domains that pertain to each chapter.
- ***ABHES Areas of Competence** that pertain to each chapter.
- **Lesson Plan Suggestions** offer ideas for topics to discuss with a list of activities to assign.
- **Additional Activities** are suggested for each chapter and could be adopted to enhance class time and motivate students or assigned as extra credit.
- **Abbreviation and Spelling Review** chart note answers appear for *Workbook* chapters.
- **Stop-and-Think Case Scenarios and Answers** are included to aid the instructor with discussion of possible answers to problems presented in realistic office situations.
- **Exam-Style Review Question Answers** are included for the *textbook's* end-of-chapter multiple-choice questions.
- **Review Questions and Answers** provide an easy reference source during class discussion or independent assignment correction.
- **Critical Thinking Exercises and Answers** are listed for easy reference during class discussion or independent assignment correction.
- **Job Skill Answer Keys** are listed with rationales and various forms are illustrated to assist the instructor with correction.

Section II: Medical Terminology and Abbreviation Tests

- **Review Tests** provide a review of terms and abbreviation definitions.

Instructors' feedback and comments on the *textbook* and all ancillary materials are welcome and should be emailed or addressed to the publisher or author using the addresses listed in the *Instructor Resources*.

Section III: Educational Competencies

Competency-Based Learning

- AMT Medical Assisting Task List for the RMA

Competency Tables for:

- CAAHEP Educational Competencies
- ABHES Competencies
- CMA (AAMA) Certification Examination Content
- RMA (AMT) Certification Examination Competencies
- CMAS (AMT) Examination Specifications

SUMMARY

One of the things that makes medical assisting such an exciting field is its ever-changing nature; nothing stays the same. Thus, it is essential that all medical personnel attend workshops and continue to update their knowledge by reading current notices such as those listed in the expanded *Resources* section at the end of each chapter. It is my hope that this learning package will assist in patient care by helping to educate competent, service-oriented medical assistants and will be a stepping stone to new knowledge, understanding, appreciation, and advancement in the medical assisting profession.

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Linda French worked in a physician office setting for 15 years performing administrative and clinical duties including medical insurance billing and was then promoted to office manager. She became a Certified Medical Assistant-Clinical Specialist through the American Association of Medical Assistants in 1982. The practices included obstetrics and gynecology, internal medicine-cardiology, orthopedics, and chiropractic medicine.

In 1995, she began her teaching career at Simi Valley Adult School where she expanded medical insurance billing-related classes and developed a coding program. In 1999, she became certified as a National Certified Insurance Coding Specialist through the National Center for Competency Testing and in 2002 received her Certified Professional Coding certificate through the American Academy of Professional Coders. In addition to teaching at the Adult School for 10 years, she also taught medically related classes at two community colleges, several private post-secondary institutions, and private corporations through the University of California at Santa Barbara's UCSB-Extend program.

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Unit 1

PROFESSIONAL AND CAREER RESPONSIBILITIES

1

A Career as an Administrative
Medical Assistant

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The Health Care Environment:
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A CAREER AS AN ADMINISTRATIVE MEDICAL ASSISTANT

LEARNING OBJECTIVES

After reading this chapter and learning step-by-step procedures to gain job skills,* you should be able to:

- Demonstrate how customer service skills are applied in the medical office.
- Describe the variety of career advantages, employment opportunities, areas of specialization, and job prospects for those trained as administrative medical assistants.
- Itemize 10 job responsibilities of an administrative medical assistant.
- List interpersonal skills needed to be an administrative medical assistant.
- Establish priorities and implement time management principles to organize and perform clerical duties.
- Compare and contrast assertive and aggressive behavior.
- Discuss patient reactions to health problems and your role when interacting with a distressed patient or family member.
- Explain various patient reactions to death and name the stages of dying.
- Define stress and identify strategies to reduce stress and burnout.
- State various components in professionalism.
- Understand the importance of and opportunities for certification or registration in your area of study.
- Relate how a health care professional can keep current in medical knowledge, policies, procedures, and the latest trends in the medical community.

PERFORMANCE OBJECTIVES (PROCEDURES) IN THIS TEXTBOOK

- Interpret and accurately spell medical terms and abbreviations (Procedure 1-1).

PERFORMANCE OBJECTIVES (JOB SKILLS) IN THE WORKBOOK

- Interpret and accurately spell medical terms and abbreviations (Job Skill 1-1).
- Use the Internet to look up key terms and hear pronunciations (Job Skill 1-2).
- Prioritize a task list to practice time management skills (Job Skill 1-3).

**This textbook and the accompanying Workbook meet the educational components for entry-level administrative and general competencies outlined by CAAHEP and ABHES.*

- Use the Internet to obtain information on certification or registration (Job Skill 1-4).
- Use the Internet to test your knowledge of anatomy and physiology or medical terminology (Job Skill 1-5).
- Develop a medical practice survey (Job Skill 1-6).

KEY TERMS

accreditation	Certified Medical Administrative Specialist (CMAS [AMT])	National Certified Medical Assistant (NCMA)
administrative medical assistant	Certified Medical Assistant (CMA [AAMA])	National Certified Medical Office Assistant (NCMOA)
aggressive	clinical medical assistant	National Healthcareer Association (NHA)
American Association of Medical Assistants (AAMA)	continuing education units (CEUs)	patient navigator
American Medical Technologists (AMT)	empathy	professionalism
assertive	flextime	recertification
burnout	hospice	Registered Medical Assistant (RMA [AMT])
certification	interpersonal skills	registration
Certified Clinical Medical Assistant (CCMA)	licensure	stress
Certified Medical Administrative Assistant (CMAA)	multiskilled health practitioner (MSHP)	sympathy
	National Center for Competency Testing (NCCT)	



Service

Motto: *Think with empathy, act through service.*

The heart of the health care professional should be directed at serving patients. Regardless of your duties, service is woven into all areas of medical assisting. You have the ability to make this world a better place by becoming a vital part of a health care team and serving patients' needs. Believe in yourself, always do your best, and remember—there is no goal you cannot achieve.

WELCOME TO ADMINISTRATIVE MEDICAL ASSISTING

Welcome to *Administrative Medical Assisting*. You have taken the first step into a world that will stimulate your mind, motivate your curiosity, energize your work ethic,

and enliven your spirit so that you will want to learn and contribute something good to today's society.

A typical day in a medical office might include expediting an appointment so that an anxious mother can bring in her ill infant, building rapport with a teenager who is afraid to tell the doctor about her promiscuous behavior, calming a patient who is angry about a bill, reassuring a pregnant mother who is experiencing morning sickness for the first time, or offering a listening ear to a patient who has just received a problematic diagnosis. Every day is different and exciting, and each day offers challenges and opportunities for personal growth and advancement. It is an ever-changing, dynamic field, one where fascinating breakthroughs are taking place in patient care and technology and one in which the rewards always outweigh the task at hand.

Whether you are learning clerical skills to perform as an administrative medical assistant, pharmacy technician, massage therapist, or other type of health care professional, this book will help you learn step-by-step procedures needed to perform a full range of activities to master job skills that will enable you to demonstrate customer service, educate patients, and call upon your

newly learned knowledge. As you become proficient in medical terminology and learn guidelines and laws, they will help you manage patient care and create a safe environment to promote healing. You will play an integral role in a medical office as you work closely with physicians or pharmacists and become a lifeline to many patients who rely upon you to educate and assist them. "The versatility of a well prepared medical assistant is what the physician practices are looking for and need to stay afloat in today's global market."*

CUSTOMER SERVICE-ORIENTED PRACTICE

A vibrant medical practice is a service-oriented practice where the elements of customer service are demonstrated by the physician, management team, and all employees. Satisfied patients are the key to a health care provider's success. A willingness to serve patients is an attribute that all health care professionals need—those who do not have this attitude are in the wrong career. Serving means putting someone else's needs before your own. Patients often interrupt daily work routines, so it is imperative to continually remind yourself that serving the needs of patients is the reason for going into this profession (Figure 1-1).

Within the "Heart of the Health Care Professional," as shown at the beginning of each chapter, is a variety of ways to serve patients. As you work your way through this text and study the step-by-step procedures that will help you perform new job skills, you will be able to determine different ways that you can provide good customer service. Remember, each employee and patient may have a different idea about what "good" service means. All employees are customer service personnel at the same time they are performing other duties. Any time you have contact with a patient, it has an effect. Always put the patient above your own needs and routine duties. The following questions will help you determine where customer service occurs:

- Has the patient's confidentiality been protected and physical safety ensured?
- Has the patient been dealt with in a courteous, respectful, and caring manner?
- How is the task that you are performing beneficial to the patient?



FIGURE 1-1 An administrative medical assistant serving a patient by explaining office policies

- How can this task be accomplished efficiently?
- Are you observing patient interactions, and are you aware if there is patient involvement or problems?
- What is the desired outcome for the patient?
- Have the patient's expectations been met?
- Have you seized every opportunity to educate the patient?

Another way to serve the patient is by taking on the role of a **patient navigator**. A patient navigator provides emotional support and helps coordinate patient care by connecting patients with resources and guiding them through the health care system so that timely care is provided. Trained, culturally sensitive patient navigators are frequently used when a chronic disease, such as cancer, heart disease, or diabetes, exists so that informed medical decisions can be made and the treatment plan is understood and followed.

The medical assistant is in a prime position to orient the patient to office policies so that information is gathered, schedules are kept, and treatment is



Patient Education

The physician may ask you, as a competent and knowledgeable medical assistant, to educate patients. The doctor should provide guidelines and give you parameters on the information or instructions he or she would like you to share. You will see Patient Education boxes with this icon throughout this text. These boxes can be used to gain insight regarding a variety of ways to instruct patients.

*Medical Assisting Education Review Board (MAERB) 2009 report on administrative competencies.

uninterrupted. Information about treatment and medications, test results, pre- and postoperative care, personal and physical safety, and community services may also be relayed.

He or she may help the physician educate patients to take better care of themselves with respect to smoking cessation, eating a balanced diet, maintaining optimal weight, increasing exercise, good hygiene, body mechanics, and learning methods for stress management. Patient education is ongoing and takes many forms. In some medical practices, the medical assistant may teach the patient using health-related educational materials, such as brochures, DVDs, or other visual aids. The Internet is also available for research, and a technical-savvy physician can help you direct patients to approved sites. Or, it can be as simple as answering a question, explaining a procedure, assisting with paperwork, or demonstrating as you give instruction. If you give patients new information and they indicate they understand, access their understanding by having them summarize the new information. No matter which method is used, the goal is to inform and teach patients on their level, so they can understand how to take an active part in their medical care (Figure 1-2).

CAREER ADVANTAGES

Medical assisting, both clinical and administrative, attracts individuals with an interest in people and medicine. The skills and knowledge required for this career will last a lifetime, and work is available anywhere in the world that medicine is practiced. A training

program prepares the individual for a variety of employment opportunities. It may be combined with further education and can result in both certification or registration and a college degree. The work is rewarding and challenging because of its variety and ever-changing nature. Part-time, **flextime**, and full-time employment are available in a variety of medical settings, as described in Chapter 2.

Flextime offers the employee a range of hours (instead of fixed hours), which may include a split shift, coming in early, leaving late, or working different times on different days to maximize the efficient running of the office.

EMPLOYMENT OPPORTUNITIES

According to experts in career outlook, a variety of positions in the health care field are estimated to grow much faster than the average. The health care industry will continue to expand because of technological advances in medicine and the growth and aging of the population. Among those are clerical or administrative jobs in medical assisting and specialty career options such as bookkeeper, insurance and coding specialist, managed care coordinator, medication assistant, patient care technician, patient navigator, pharmacy technician, physical therapist aid, and pediatric medical assistant. Some of these career options offer specialized certifications. Although the terms *medical assistant* and *administrative medical assistant* are used primarily in this text, many of the job functions are similar to the clerical duties performed by other allied health professionals specializing in these areas.

Job Outlook

According to the U.S. Department of Labor *Occupational Outlook Handbook* (2012 edition), a 29% growth rate is predicted for medical assistants from 2012 to 2022. The *Handbook* also states that, “Medical assistants with formal training or experience—particularly those with certification—should have the best job opportunities, since employers generally prefer to hire these workers” (see Table 1-1).

Administrative Medical Assistant

Employment opportunities for those with clerical skills are available in physicians’ offices (both solo and group practices), clinics, hospitals, dental offices, foundations, research institutes, public school health service



FIGURE 1-2 Patient education requires skill in communicating instructions to patients in language appropriate to their needs

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TABLE 1-1 Job Projection Data*

Occupational Title	2014 Employment	2024 Projected Employment
Medical assistants	591,300	730,200

*U.S. Department of Labor *Occupational Outlook Handbook*, 2014–2015 edition.

departments, prisons, the armed services, insurance companies, public health departments, medical departments of large companies, Medicare agencies, managed care organizations, offices of nurse practitioners, outpatient facility centers, laboratories, pharmaceutical companies, and medical instrument and supply firms. Employment opportunities are also available in the fields of manufacturing, publishing, and teaching; and in freelancing, for example, as a self-employed insurance biller or medical transcriptionist, now known as a *medical language specialist* (MLS) or *speech recognition technician* (SRT).

Clinical Medical Assistant

The **clinical medical assistant** performs back-office or clinical duties, such as assisting during physical examinations, maintaining treatment rooms, sterilizing instruments, assisting with minor surgery, giving injections, performing electrocardiograms (ECGs), obtaining vital signs, performing phlebotomy, and doing laboratory procedures.

Those who want active involvement and a great variety of duties can become medical assistants performing both administrative and clinical duties. (Online Chapter 21 has information on finding a job.)

The clinical duties mentioned, however, are beyond the scope of this book.

ADMINISTRATIVE MEDICAL ASSISTANT JOB RESPONSIBILITIES

The position of **administrative medical assistant** requires medical knowledge, organizational and business skills, and the ability to meet accepted performance standards of health care workers. Managed care has had an impact on the way in which medical assistants perform their jobs, and additional documents must be completed for preauthorization of tests or surgeries. Patients must be greeted, either on the telephone or on their arrival at the office. Appointments must be

carefully scheduled for efficient use of every working moment. Written correspondence involves composing or transcribing dictated letters, and a medical assistant should have a good command of the English language—and sometimes additional languages. Insurance forms need to be completed and submitted, and the mail must be screened for security, opened, sorted, and acted on. Patients' chart notes must be keyed into an electronic medical record (EMR) system to record the progress of the patient. Medical documents must be scanned and filed or transmitted electronically or photocopied and faxed to other facilities. Medical and office supplies have to be ordered and an inventory kept. The medical assistant oversees the reception room, making certain that furniture and magazines are in order and plants are fed and watered.

The administrative medical assistant is also in charge of collecting fees, billing patients, maintaining records on accounts receivable, and collecting overdue accounts, so basic mathematic skills are necessary. When invoices arrive, there are checks to be written for payment and records to be maintained on accounts payable. Banking and payroll may be two more of the medical assistant's functions.



Electronic Health Record

Computer technology is now routinely found in the medical office, and medical assistants need to know computer programs to operate an electronic health record (EHR) system, maintain EMRs and patient accounts, transmit insurance claims electronically, obtain information from the Internet, and communicate via electronic mail with patients and other businesses. Each time you see the EHR icon, the content following it will focus on today's electronic medical office.

A fluency in medical terminology is imperative so that communication can take place between the medical assistant and the physician, office manager, coworkers, patients, and outside professionals. Medicolegal knowledge is vital in avoiding medical professional liability suits.

When the physician attends a convention or delivers a lecture, the assistant may be responsible for preparing the manuscript and setting up travel arrangements. Hospital admissions need to be arranged as well as surgeries scheduled. Telephone calls come in from patients, laboratories, physicians, representatives of pharmaceutical companies, equipment manufacturers, and the physician's family, and all require expertise and tact. As you have read, the administrative medical assistant performs a multitude of job skills and is responsible for the smooth functioning of the medical office.

A generic job description for an entry-level administrative medical assistant is presented in Figure 1-3. Although this is not a complete list of job responsibilities or performance standards, it provides an overview of what an individual does on the job when working in this career. It may also serve as a guideline for an employer who is developing a job description. Subsequent chapters and job skills in the *Workbook* that accompanies this text will help you achieve the many skills outlined in this job description.

INTERPERSONAL SKILLS

Being a medical assistant is more than a job—it is a career. The career of medical assisting requires many office and **interpersonal skills** often referred to as “soft skills.” These are positive behavior traits and exemplary personality characteristics. They include business etiquette, commitment, consideration and respect for others, creativity, critical thinking, dedication, drive, enthusiasm, friendliness, genuineness, initiative, integrity, negotiation skills, openness, oral communication skills, social grace, team spirit, a sense of warmth and sensitivity, a positive attitude, and a willingness to learn and take on responsibility. However, the most important personality traits are liking people and being able to get along with other individuals.

The ability to keep information confidential honors patients' rights and instills trust. Patients need to know they can count on health care workers to be discreet. Everything a medical assistant sees, hears, or reads in the office is privileged information.

Listen and Observe

Listening and *observing* are important skills to use when trying to understand a viewpoint or evaluating a patient's behavior. They allow you to decide what response is best (see Chapter 4).

Interest and Concern

Patients expect the assistant to act toward them with a sincere desire to help. To show *interest* and *concern* for their welfare acknowledges patients as individuals with special needs. Tone of voice can convey this concern in person or over the telephone.

Respect

Respect is something we each desire. Following are some ways to gain and give respect, but we must first love and respect ourselves. Always keep an open mind and try to understand another's viewpoint. Listen without interrupting and take others' feelings into consideration. Do not pressure others into agreeing with you; instead agree to disagree. Be a friend and build your coworkers up instead of tearing them down. Be honest, communicate directly, and build trust by fulfilling obligations and completing work projects in a timely manner. Respect is holding a special regard for someone and it can be obtained and shown by following the Golden Rule: *Do to others as you would have them do to you.*

Sensitivity to Others

It is important to be *sensitive* to a patient's feelings; pretending that feelings do not exist does not serve the patient's best interest. Dealing with ill people who are often cranky, depressed, or angry at their situation makes it even more important to always be pleasant. It requires the use of discretion and tact to know what to say in a variety of situations.

Empathetic and Positive Attitude

When an emergency arises, the ability to follow instructions is imperative, as is using sound judgment, maintaining a calm demeanor, and displaying **empathy**. Being able to put yourself in the patient's situation or understanding his or her point of view (Example 1-1) is the basis of empathy; you need not agree with the

EXAMPLE 1-1

Empathetic Phrases

“You seem to be upset.”

“That must have been painful.”

“How disturbing.”

“What a frustration.”

ADMINISTRATIVE MEDICAL ASSISTANT JOB DESCRIPTION

Knowledge, skills, and abilities

1. Minimum education level consists of high school graduation or equivalent and (a) a certificate from a 1- or 2-year medical assisting program emphasizing administrative procedures, (b) an associate degree, or (c) the equivalent in work experience and continuing education.
2. Knowledge of basic medical terminology, math skills, and insurance claims completion; anatomy and physiology, diseases, surgeries, medical specialties, and various administrative procedures as required in areas of responsibility.
3. Ability to operate computer, scanner, photocopy, facsimile, and calculator equipment.
4. Understand commercial medical software programs, electronic medical record management, and telemedicine.
5. Written and oral communication skills, including grammar, punctuation, and style.
6. Knowledge of and the ability to use procedure and diagnostic codebooks as well as an understanding of computerized coding programs.
7. Ability to key or type a minimum of 45 wpm.
8. Ability to follow directions, participate as part of a team, as well as work independently.



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Working conditions

Medical office setting. Sufficient lighting and work space, adjustable chair, and adequate office supplies.

Physical demands

Prolonged sitting, standing, and walking, using computer equipment. Some stooping, reaching, climbing, and bending. Occasional lifting of several pounds to a height of 5 feet. Hearing and speech capabilities necessary to communicate with patients and staff in person and on telephone. Vision capable of viewing computer monitors, calculators, charts, forms, text, and numbers for prolonged periods.

Salary

Employer would list range of remuneration for the position.

Job responsibilities

1. Exhibits an understanding of ethical and business.
2. Receives incoming telephone calls, places calls, and documents certain types of calls.
3. Schedules and reschedules appointments.

Performance standards

- 1.1 Observes policies and procedures related to medicolegal responsibilities related to confidentiality, medical records, and all professional liability matters in a physician's office practice.
- 1.2 Meets standards of professional etiquette and ethical conduct.
- 1.3 Recognizes and reports potential medicolegal problems to appropriate individuals.
- 2.1 Screens incoming telephone calls properly.
- 2.2 Logs telephone calls and documents certain types of phone calls in patients' medical records.
- 3.1 Maintains appointments accurately.
- 3.2 Obtains precertification, predetermination, and/or preauthorization for services and procedures when necessary.

FIGURE 1-3 A generic job description for an entry-level administrative medical assistant. This is a practical, useful compilation of the basic job responsibilities. It is not a complete list of duties and responsibilities but may be used as a guideline when developing a job description.

ADMINISTRATIVE MEDICAL ASSISTANT JOB DESCRIPTION (continued)**Job responsibilities**

4. Greets and receives patients and visitors.
5. Registers new patients and updates existing records.
6. Screens for security, opens, sorts, and distributes mail, electronic mail, and faxed communications.
7. Maintains reception room and business office.
8. Maintains inventory and orders supplies.
9. Documents prescription refills.
10. Prepares electronic records or charts.
11. Files and refiles patient charts and documents.
12. Operates computer and calculator equipment.
13. Keys correspondence and/or transcribes patients' chart notes.
14. Prepares and posts transactions in computer or on daysheets.
15. Posts transactions in computer or on ledgers (accounts).
16. Executes banking responsibilities.

Performance standards

- 4.1 Receives each patient in a professional manner.
- 4.2 Makes eye contact with patients to acknowledge them when otherwise occupied by various duties.
- 5.1 Issues proper forms to new and established patient files for good recordkeeping.
- 5.2 Reviews documents for accurate and complete information.
- 5.3 Collects, scans or photocopies, and returns insurance cards to patients.
- 6.1 Handles daily mail using proper screening techniques, carefully sorting and distributing it.
- 6.2 Electronically transmits or faxes documents using legal guidelines to maintain confidentiality.
- 6.3 Communicates by email using proper format and etiquette.
- 7.1 Keeps reception room and business office clean and organized so it presents a professional image at all times.
- 8.1 Reviews inventory and orders office and medical supplies at proper time intervals.
- 9.1 Logs prescription refills made via telephone, fax, or electronic mail.
- 10.1 Obtains patient information data and scans into EMR or assembles into a chart using required labels.
- 11.1 Organizes and maintains files efficiently using appropriate filing systems for ease in retrieval.
- 12.1 Operates equipment skillfully and efficiently.
- 12.2 Evaluates condition of equipment and reports need for repair or replacement.
- 13.1 Formats and keys correspondence and medical records according to employer's guidelines.
- 14.1 Posts entries into computer or daysheet with appropriate bookkeeping expertise, bringing totals forward.
- 15.1 Posts charges, payments, and adjustments in computer or by hand, calculating a running balance, to patient accounts/ledgers with appropriate accounting expertise as professional services are rendered.
- 16.1 Writes and posts checks correctly.
- 16.2 Makes timely bank deposits.
- 16.3 Reconciles bank statements using proper bookkeeping procedures.
- 16.4 Maintains petty cash fund daily.

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ADMINISTRATIVE MEDICAL ASSISTANT JOB DESCRIPTION *(continued)*



Job responsibilities

17. Collects payments from patients and/or bills patients.
18. Follows up on delinquent accounts and insurance claims.
19. Reconciles daily receipts received.
20. Processes managed-care forms and paperwork.
21. Follows employer's policies and procedures.
22. Enhances knowledge and skills to keep up-to-date.
23. Employs interpersonal expertise to provide good working relationships with patients, employer, employees, and individuals contacting the medical office.
24. Optional: Makes travel arrangements for physician's medical conferences.
25. Optional: Prepares employee payroll.
26. Optional: Completes insurance claim forms.
27. Optional: Performs library research responsibilities and prepares manuscripts.

Performance standards

- 17.1 Communicates effectively with patients to collect payments.
- 17.2 Prints and sends statements at proper intervals using appropriate reminder (dun) messages.
- 18.1 Telephones patients for payment of monies owed and traces insurance claims in a timely manner.
- 19.1 Reconciles daily monies with appropriate financial expertise.
- 20.1 Completes appropriate managed-care paperwork with accuracy according to each plan's guidelines.
- 21.1 Arrives punctually for work and is dependable.
- 21.2 Answers routine inquiries related to the medical practice, insurance, and so forth.
- 22.1 Attends continuing education activities on an ongoing basis.
- 22.2 Obtains current knowledge applicable to all administrative medical assisting duties.
- 23.1 Works with employer and employees cooperatively as a team.
- 23.2 Communicates effectively with patients and individuals who come in contact with the medical practice.
- 23.3 Executes job assignments with diligence and skill.
- 23.4 Assists other employees when needed.
- 24.1 Telephones travel agent to arrange for physician's business trips in a timely manner.
- 25.1 Calculates payroll deductions, writes checks, and maintains financial business records accurately.
- 25.2 Prepares federal and state forms within time limits.
- 26.1 Inserts and reviews data on insurance claims for accuracy.
- 26.2 Codes procedures and diagnoses correctly.
- 26.3 Transmits claims electronically.
- 27.1 Formats and keys manuscripts according to guidelines of professional association or publication.
- 27.2 Researches information using the library or Internet.

FIGURE 1-3

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patient's point of view. **Sympathy**, on the other hand, is displaying feelings that are so close to the person affected that you are similarly affected. This can inhibit you from helping.

A patient's mental state has a strong influence on his or her overall health. A *positive attitude* plays an important role in wellness. A medical assistant with a positive attitude may act as a role model and may help encourage patients who are naturally negative or *pessimistic*.

Initiative and Motivation

Initiative and high *motivation* indicate job satisfaction to the employer, who is, of course, pleased with employees who are content and productive. An ambitious medical assistant also impresses patients. It is easy to spot a medical assistant who takes pleasure in performing office tasks and serving patient needs.

Time Management

Being able to manage time well is an attribute that can be learned while in the classroom. With effective time management, an efficient medical assistant with good organizational abilities can often take over chores that free the physician to spend more time with patients. The medical assistant should be able to prioritize and perform multiple tasks. Each day a task list should be created, and every job that needs to be done prioritized. Using self-discipline by self-imposing deadlines aids in overcoming indecision, vacillation, and procrastination. Remembering that patients come first will help set goals for the day instead of doing each task as it appears. The physician or office manager can help by giving an outline of priorities in the office setting.

Medical Assistant's Creed

Perhaps nothing states personal qualifications better than the Medical Assistant's Creed, which was adopted in 1996 by the American Association of Medical Assistants House of Delegates. It reads:

I believe in the principles and purposes of the profession of medical assisting. I endeavor to be more effective. I aspire to render greater service. I protect the confidence entrusted to me. I am dedicated to the care and well-being of all people. I am loyal to my employer. I am true to the ethics of my profession. I am strengthened by compassion, courage, and faith.

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Team Interaction

Working as a medical assistant requires a *team effort*. The assistant should view every task as important and no job as too small or insignificant to do. You should establish a good working relationship with coworkers, treating them with respect and support. It is also important to get along with supervisors, accept criticism, and show regard for their authority. Those who can join in doing their part, no matter how small, are viewed as a vital part of a team. An assistant should reinforce effective rather than ineffective behavior and, instead of complaining about problems, focus on finding solutions. More staff members lose their positions because of an inability to get along with coworkers than because of an inability to perform office duties. Positive relations are further fostered by handling the special needs of people who are disabled with kindness and courtesy and by remaining composed when dealing with people who are unruly or inconsiderate.

UNDERSTANDING WORK-RELATED EMOTIONAL AND PSYCHOLOGICAL PROBLEMS

Even though there is a spirit of interdependence and teamwork among medical office staff, some frictions and irritations may arise. The medical assistant who is aware of types of behavior and conditions that may cause negative reactions, stress, and burnout, and who understands those reactions can attempt to head off problems before they become a matter of concern and affect productivity.

Work Relationships

Coworkers come in many shapes with a variety of personalities. As you strive to build good working relationships, you will discover that some behaviors require action and some do not. For instance, the office *gossip* may distract you while conveying personal secrets or talking about others. The rule is to never tell anything that you do not want repeated. The *disruptor* may interrupt you with something trivial. Try to tell them politely but directly that you are busy and need to get your work done. The *credit hog* wants to take all the glory and usually does so in front of the supervisor. Most likely, you will not have to do or say a thing because the credit hog's behavior will become transparent. The worker with the

one-track mind may be annoying because he or she will not stop to do a prioritized task but instead will work diligently to complete what was started. It is usually best to let this worker finish the task. Perhaps the most bothersome personality trait is the *know-it-all*. You cannot tell them anything, correct them, or train them—they know it all! It may be necessary to speak to the office manager if you encounter such a person. It is wise to examine yourself to see if you display any of the above traits—and if so, once you recognize it you will be more successful at discarding that behavior.

Aggressive versus Assertive Behavior

Sometimes there is a fine line between being aggressive and assertive. **Aggressive** people are forward, pushy, and overbearing. They may not intend to behave this way as they try to convince or manipulate others, but they often depict a righteous attitude that can lead to confrontation. They come across as if they think they are superior and often make derogative remarks. They may have underlying resentment or anger, which leads to a defensive attitude and behavior. They are usually more concerned with their own agenda than another person's needs.

Being **assertive** reflects professional confidence. The assertive health care worker shows respect for others and does not feel threatened. To be assertive, you need to trust your instincts, feelings, and opinions when you are communicating with coworkers and patients. An example of acting assertively based on your instincts (instead of being *passive* and doing nothing) is when you see a coworker or patient who looks fatigued, speaking up and saying something like, "You look tired. Are you getting enough rest or is something bothering you that I can help you with?" Being assertive takes practice but will help you develop leadership ability and resolve conflicts peacefully.

Grieving or Distressed Patients

Unstable health, a poor diagnosis, or a terminal illness will cause a variety of emotions in patients and families. It is important to understand emotional behavior such as being subdued or quiet, talkative or inquisitive, loud or volatile, and distraught. The patient may go into emotional shock from being told bad news. People in shock react differently and may cry loudly, sit quietly, or talk incessantly. They may feel like they want to leave the office abruptly or have a sense that they are outside their bodies hearing and watching all of the events.

Physically, the patient may start crying uncontrollably (hysteria), have increased breathing, begin trembling, experience a change in skin color, or sit with a blank stare. These are all normal and understandable reactions to upsetting news.

When patients receive unfortunate news about themselves or loved ones, it is important to demonstrate empathy, offer assistance, and provide follow-up support. Patients may be so upset or shocked that they are unable to remember anything said during such times. Written instructions, health care pamphlets, or other materials about the patient's particular diagnosis should be offered. These should include cause of illness, treatment options, prognosis, and contact sources in the community or on the Internet where additional information may be found. Follow-up appointments should be arranged to further discuss the situation after the patient and family have time to digest the news. When dealing with a distressed patient, follow these guidelines:

1. Be open and honest by asking what they would like to know about the situation.
2. Treat every problem with concern no matter how small it may seem.
3. Offer support through words, actions, and resources.
4. Do not give false reassurances.

Death and Dying

The rights of patients who are terminally ill and their families must be considered and honored when making decisions regarding family issues, quality of life, and quantity of life. The assistant should become familiar with *living will* and *durable power of attorney* documents and help the patient complete these, especially in regard to decisions about life support, resuscitation, and artificial feeding. These advance directives are further discussed in Chapter 3 *Medicolegal and Ethical Responsibilities*.

The way people face death may include extreme responses, and the health care worker needs to be aware of and respect each patient's reactions. Each person should be allowed the freedom and dignity to have an active part in the choices made. The dying patient should retain some control over financial decisions as well as his or her treatment.

If survivors of the deceased come to your office, you may want to give them a list of support groups that offer grief counseling. The listing should contain both religious and secular groups. Demonstrate

kindness by sending a sympathy card—your thoughtfulness will be appreciated. Reassure survivors that they do not need to worry about the medical bill right now, and that the billing department will work with them.

Elisabeth Kubler-Ross introduced several stages typical of someone diagnosed with a terminal illness in her book *Death: The Final Stage of Growth*. Each stage takes varying amounts of time and may or may not occur in the order shown. The medical assistant needs to accept the various emotions expressed by patients and their families. Experiencing a loss is painful, and each person must be allowed to grieve. There is no standard as to how long grief, the readjustment period, or the recovery time lasts. Demonstrating sincere concern with a warm smile and an expression of sympathy will provide comfort to grieving family members.

Stages of Dying

Denial—In the first stage, denial appears to be a defense mechanism and may recur at other times during the dying process. The patient refuses to believe that life is coming to an end and may continue to go about daily activities as if nothing were wrong.

Anger—During the second stage, anger may be directed at anyone and everyone. A common question the patient asks is, “Why me?” This is a difficult time for family, friends, and the health care worker.

Bargaining—While experiencing the third stage, the patient may keep information private, so others may or may not be aware of any problem. The patient pleads and tries to negotiate his or her life for a period of time. There may be an upcoming event that the patient may want to experience, expressing, “If I can only last until . . .” The bargaining may be with God, with fate, or with other people.

Depression—At the fourth stage as the illness progresses, so do the pain, weakness, and other symptoms. The patient has trouble denying what is happening. Bargaining is futile and anger begins to give way to sorrow. The patient may slip into a depression over the impending loss and separation that are about to be experienced.

Acceptance—During the last stage, it is hoped that the patient has had enough time and has been able to work through the other stages. Being able to *accept* what is *inevitable* will help the patient be at peace while awaiting what is about to happen.

Death with Dignity Act

The *Death with Dignity Act* became law in the state of Oregon in 1997. More recently, a similar act went into effect in the states of California, Montana, New Mexico, and Washington. This act allows licensed physicians (MDs or DOs) to prescribe lethal medications for voluntary self-administration by state residents who are mentally competent, terminally ill adults.

This act does not cover *euthanasia*, in which a doctor injects a patient with a lethal dose of medication; euthanasia is illegal in every state. Health care workers should take a neutral position when dealing with patients who request “death with dignity.” They should respect individual patient decisions and not offer opinions or reflect personal judgment.

Hospice

The **Hospice** Foundation of America is a national program that offers medical care and support to patients and family members dealing with a terminal illness and the loss of a loved one. The hospice staff consists of an interdisciplinary team comprising physicians, nurses, social workers, home health aids, counselors, therapists, chaplains, and trained volunteers on call 24 hours a day, 7 days a week.

The earlier the hospice team enters a terminal case, the more help they can provide. All members of the team are trained in dealing with the various aspects a patient and the family face during a life-threatening illness and the dying process. They provide medical



PATIENT EDUCATION

The Dying Process

An administrative assistant trained in patient education can help motivate patients and extend the physician’s reach and effectiveness. The medical assistant may need to help family members of a patient who is dying by educating them about the stages Kubler-Ross describes in the dying process, that is, denial, anger, bargaining, and depression, before being able to accept the situation. Being open, answering questions, and rendering support will show care and concern. Supplying information about community services and contacting a hospice agency makes evident your regard for their situation.



PATIENT EDUCATION

Hospice

Hospice, a term used in the Middle Ages to signify a place where weary pilgrims could stop, rest, and refresh themselves before continuing on with their journey, has become a worldwide movement symbolizing a new kind of care for the terminally ill. In 1967, a British physician, Cicely Saunders, founded St. Christopher's Hospice in a London suburb and in 2014, in the United States alone, between 1.6 and 1.7 million patients received services from hospice. Hospice information pamphlets are available for educational purposes, and the professional staff promotes comfort, safety, meaningful living, and closure for patients and families.

equipment, medicine, and pain management; answer questions; acknowledge emotional and psychological needs; promote independence at home; assist with funeral arrangements; and help with the transition that both patients and family members are faced with. Their primary focus is on the quality of life and the dignity of the dying patient.

Stress and the Health Care Worker

Stress is a condition comprising physical, psychological, and emotional reactions to time constraints and frightening, exciting, confusing, endangering, or irritating circumstances. Coping with illness, life and death issues, and emotionally upset patients on a daily basis can cause stress for the health care worker. A fast-paced office, demands of the physician, emergency situations, lack of private time or space, and interactions with coworkers and other professionals can all add to the pressure and tension that are felt by the medical assistant. Also, personal circumstances such as financial obligations, relationship problems, or the illness or death of a loved one contribute to the emotional overload that sometimes occurs. Even positive events such as marriage, pregnancy, moving, or a promotion can add stress to the mix.

Ongoing stress can be overwhelming and a barrier to communication. As mentioned, events and situations, both positive and negative, can cause physical and psychological tension. The less control you have over the event or situation, the more you feel stress.

Both physical and mental changes occur when stress levels increase. Symptoms such as aching muscles, difficulty concentrating, forgetfulness, loss of appetite, restless sleep, stomach pain, shortness of breath, a nervous tic, or a complete sense of exhaustion can appear. It is considered a contributing factor to many disorders society experiences today such as depression, headaches, hormonal changes, hypertension, and lowered resistance to disease. Some emotional components that occur when stress is not managed are crying, shouting, drinking alcohol, taking drugs, sleeping more than necessary, and becoming angry. Such negative responses are referred to as *nonadaptive* or *maladaptive* coping mechanisms.

Coping with Stress

Occasionally people say, "a little bit of stress is good for you" or "there is good stress and bad stress." However, stress is often confused with challenges. A challenge will energize you, both physically and psychologically, as it motivates and pushes you to perform at a high level. A relaxed and satisfied feeling is realized once the challenge is met. Stress, on the other hand, can cause tension and create negative physical and emotional responses. Different people can cope with different amounts of stress in different ways.

To deal with stress, you first need to be aware of what causes it. When the requirements of a job do not match the capabilities, resources, or needs of the worker, stress occurs. The multiple duties of the health care worker and changes in the work environment or home situation are common causes. Frustration may build, anger sets in, and before you know it, you are stressed out. After you identify its root, evaluate the situation to see if you can eliminate some of the sources that are the cause. Confront the problem directly and work toward a solution, so you feel as if you have some control over the situation. Cultivate healthy relationships, take regular breaks at work, and schedule fun outings to help take your mind off the more serious side of life. Another way to cope with stress is to *adapt* (change) your behavior in response to stress. Use the following guidelines to practice positive *adaptive coping mechanisms* and help manage stress in the workplace:

- Go to bed and get up early to allow yourself plenty of sleep and more time before going to work.
- Notice what kind of day it is. Enjoy the environment, whether it is a bird singing, rain cleansing the earth, or a beautiful flower in the garden.

- Take your full lunch break and avoid discussing business. Eat slowly and enjoy your food by dining with an enthusiastic, good-natured staff member.
- Prepare to handle the responsibilities of your job by practicing skills. Accept your limitations and do not be afraid to acknowledge when you do not know how to do something. Instead, ask for help, get adequate instruction, and accept advice.
- Learn organizational skills, plan ahead, and prioritize tasks.
- Set realistic goals and remember there are always choices even when you feel otherwise.
- Practice relaxation techniques, such as deep breathing or focusing on something entirely different.
- Exercise your sense of humor; laughter is the best cure for tension (Figure 1-4).
- Do not overreact to problematic situations, instead be creative in exercising problem-solving skills and talk over difficult work situations with your supervisor. Always be open to share ideas and receive suggestions.
- Create and rely on a good support system. Whether it be family, friends, or coworkers, share your feelings and talk over your problems without complaining.
- Think positive and strive for a wholesome balance in your life. Monitor your own health by getting regular checkups, eating a balanced diet, resting adequately, exercising consistently, and relaxing regularly. Take quiet time to be alone, reflect, and reenergize your batteries.
- If you are not able to adapt, seek help from professionals or support groups.

By recognizing stress, understanding its common causes, and learning to apply techniques to reduce it, you can learn to cope with it, reduce its effects on your life, and live a healthier, happier life. You can also help educate patients about stress management.

Burnout

Burnout is a condition that results from too much or too little stress. It may occur suddenly or develop slowly over months. Burnout occurs most often in the “helping” professions where there may be erratic hours and emergencies involving critically ill people and death. In attempting to cope, a person withdraws from interaction with others and experiences fear, anxiety, and depression, with resulting decreased energy and productivity.

The medical assistant who has a voice in the decision-making process in an office is less likely to experience burnout. Routines might be rearranged to relieve boredom or slowed down to limit physical and mental pressure. Assignments could be varied to ensure skillful backup when an employee is absent. Remember the preceding suggestions and follow the guidelines to help relieve stress from your life and avoid burnout.

PROFESSIONALISM

It is important for a medical assistant to develop and maintain a professional image and attitude while performing assigned tasks. The ability to make independent decisions, to take initiative, to respect confidentiality, and to carefully follow the physician’s advice will project **professionalism** and establish the assistant as an efficient administrator. Professionals



FIGURE 1-4 A good sense of humor and a positive support system can help you cope with stress

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have a positive work ethic and demonstrate confidence because they are well trained and have mastered the skills of a given profession. All the personal attributes previously discussed are connected to professionalism. Other important attributes are punctuality, having the ability to adapt to new situations, being dependable and responsible in the workplace, and being emotionally stable. A professional aspires to be a better person, to reach a higher standard, to demonstrate personal integrity, and to behave according to the ethical standards of the profession. A professional uses diplomacy in dealing with difficult patients and situations and is honest and trustworthy—always respecting the patient's dignity. The term *professionalism* projects an image in the minds of all those who interact with the health care worker. This image includes both how the people present themselves and how they conduct themselves.

Personal Image

A well-groomed medical assistant conveys a professional image and creates the impression that the office procedures and medical care are of good quality, whereas a disheveled appearance suggests the office may be run carelessly. Basically, the image should be that of a professional business executive, conservative and stylish but not trendy. The dress code is usually set by the physician-employer. Medical assistants should observe other health care professionals at the top of their career ladders, and then upgrade their image to that level.

Female Grooming

Most medical offices prefer medical assistants wear uniforms. In some office settings, it is all right to wear surgical scrub suits (scrubs). If a medical facility, such as a pediatrician's office, prefers the staff to wear colors other than white, choose jewel-tone colors or deeper muted colors (Figure 1-5).

One study found that when the physician's staff dressed professionally, like the physician, there was less discrepancy in salaries. The same was true about how physicians and staff addressed one another. For instance, if the staff called the physician "Doctor" or "Practon," instead of "Doctor Practon," and the physician called the staff by their first name, there was a greater discrepancy in salary. Keep this in mind when going for a job interview.

Female medical assistants' hair should be clean and neatly styled. Makeup should be subdued for the day.

Fingernails should be carefully manicured. Do not wear long artificial nails, and do not paint on designs or have rhinestones glued to fingernails. It has been found that long nails not only interfere with various job tasks but also become a hiding place for dangerous bacteria. Nail polish may be considered as part of a professional image if a clear or light color polish is selected.

Jewelry is also considered part of the professional image for women, but it must be kept simple; earrings should not be the dangling type. A professional emblem, certification pin, or identification pin worn on the laboratory coat or uniform further identifies the medical assistant as a staff member. A certification pin should also be worn at professional functions. Consult the employer for office policy regarding body piercing and tattoos. Although perfume can be worn, use it in small amounts because it can be offensive and cause allergic reactions in some patients.

Male Grooming

Male medical assistants' hair should be clean, styled, and off the collar. Beards, mustaches, or sideburns should be neatly trimmed. A uniform may consist of white or colored slacks with a white or light-colored shirt worn with optional tie. Over this, a lab coat may be worn. If preferred, a medium-length or classic-long laboratory coat may be worn over street clothes, and in some offices scrubs may be worn (Figure 1-5). Shoes should be unsoiled and polished, with clean shoelaces. Limit jewelry to a ring or wedding band, professional pin, and identification badge. Personal cleanliness is of utmost importance, including daily bathing, use of deodorant, and good oral hygiene.

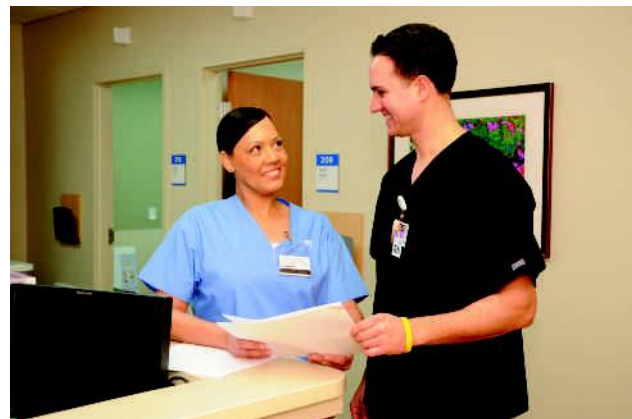


FIGURE 1-5 Male and female medical assistants projecting a clean, fresh, and professional image with hairstyling in good taste

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FIGURE 1-6 Medical assistant arriving at work

Health and Physical Fitness

The medical assistant should exemplify health and physical fitness (Figure 1-6). Some employers avoid hiring smokers and those who are extremely overweight because this would appear as a contradiction to what the physician advocates. A certain amount of physical exercise (walking, jogging, biking, swimming) is necessary to diminish stress and keep physically fit for those who have sedentary jobs.

LICENSURE, ACCREDITATION, CERTIFICATION, AND REGISTRATION

Licensure is credentialing sanctioned by a state's legislature (the government), which passes laws making it illegal for an individual who is not licensed to engage in activities of a licensed occupation. For example, Registered Nurses take state boards to become licensed in the state in which they would like to practice nursing. There are no states that require a license to work as a medical assistant, although limited permits are issued in some states for invasive procedures such as injections and venipuncture or limited radiology services. Check with your local Department of Health or the State Medical

Examiner's Office to determine if there is a current law or pending legislation in your state regarding your profession.

Accreditation can mean either meeting a state standard or being evaluated and recognized by a national organization. Usually the minimum education requirement for the position of a medical assistant is high school graduate.

Most physicians prefer to hire a person with some education in medical terminology. Vocational and commercial schools offer 6 to 18 months of training in a variety of areas that are required in medical assisting. Many community colleges offer an associate-degree program that provides a broad foundation of clinical and administrative skills either separately or combined.

Certification is not controlled by the government. It implies that an individual has met either minimum competency requirements or a level of excellence in the area defined. It is based on voluntary action by a professional organization that develops a system to grant recognition to those practitioners who meet a stated level of training and experience. Once certification is attained, most organizations require **recertification** through a continuing education process in which the health care professional is awarded **continuing education units (CEUs)**. One hour of continuing education (1 CEU) equals 1 hour of activity (contact hour).

Because a medical assistant is a **multiskilled health practitioner (MSHP)** cross-trained to provide more than one function, often in more than one discipline, it is possible to gain certification in more than one area (e.g., phlebotomist, ECG technician, medical insurance billing specialist, or professional coder).

The **American Association of Medical Assistants (AAMA)** offers a national certification examination to graduates of medical assisting programs trained in both administrative and clinical areas that are accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES). By passing this examination, the examinee receives the title **Certified Medical Assistant (CMA [AAMA])**. The content of the examination is based on a scientifically grounded occupational analysis, that is, what medical assistants are actually doing on their job. A 2012–2013 survey shows that the 12 most frequently performed responsibilities are:

1. Abide by principles and laws related to confidentiality.
2. Adapt communications to an individual's understanding.

3. Demonstrate respect for individual diversity (culture, ethnicity, gender, race, religion, age, economic status).
4. Employ professional techniques during verbal, nonverbal, and text-based interactions.
5. Comply with risk management and safety procedures.
6. Interact with staff and patients to optimize workflow efficiency.
7. Maintain patient records.
8. Provide care within legal and ethical boundaries.
9. Practice standard precautions.
10. Document patient communication, observations, and clinical treatments.
11. Identify potential consequences of failing to operate within the scope of practice of a medical assistant.
12. Transmit information electronically.

The **National Center for Competency Testing (NCCT)** is an independent certifying agency that validates the competence of a person's knowledge in different areas of the medical profession through examination. The NCCT assesses a candidate's performance against predetermined standards that are created by a job analysis survey. Either graduation from an NCCT-approved medical assisting program, 2 years of full-time employment, or equivalent part-time employment in the last 10 years is required. Medical assistants who pass the competency test receive the designation **National Certified Medical Assistant (NCMA)**. Students who focus on the administrative side of medical assisting can sit for a specialized exam, and after passing it they receive the designation **National Certified Medical Office Assistant (NCMOA)**. Following are some of the other areas of certification offered:

- National Certified ECG Technician (NCET)
- National Certified Pharmacy Technician (NCPhT)
- National Certified Phlebotomy Technician (NCPT)
- National Certified Insurance and Coding Specialist (NCICS)
- National Certified Patient Care Technician (NCPCT)

Registration is similar to certification and may be done on a state or national level. The **American Medical Technologists (AMT)** offers a **Registered Medical Assistant (RMA [AMT])** certification examination to high school graduates in any one of the following categories:

1. Students who graduate from a medical assisting program at a school accredited by either ABHES or CAAHEP.

2. Individual with 5 years of verified work experience.
3. Students who graduate from a formal medical services training program of the U.S. Armed Forces.
4. Students who have passed a general medical assistant certification examination offered by another agency, who have been working as medical assistants for the past 3 out of 5 years, and who have met all other AMT requirements.
5. Students who complete a medical assisting course with a minimum of 720 clock-hours (including 160 externship hours) in a post-secondary school or college holding accreditation by a regional accrediting commission or a national accrediting organization approved by the U.S. Department of Education.

The AMT also offers a national examination for the administrative assistant who, when passing the exam, receives the credential of **Certified Medical Administrative Specialist (CMAS [AMT])**.

The **National Healthcareer Association (NHA)** offers a number of certification examinations for several allied health care areas including **Certified Medical Administrative Assistant (CMAA)** and **Certified Clinical Medical Assistant (CCMA)**. Eligibility requirements include high school graduation or equivalent and successful completion of a training program or the minimum of 1-year work experience.

The *National Association for Health Professionals (NAHP)* also offers certification for the following nationally registered credentials: medical assistant (NRCMA), administrative health assistant (NRCCHA), and coding specialist (NRCCS), among others.

In addition, a number of specialty certifications are available on a national level, for example, medical transcription, diagnostic and procedural coding, office management, and so on. Table 1-2 provides a list of certified and registered titles with abbreviations, a brief description of how to obtain the certification or registration, and the professional organizations to contact in order to obtain more information.

Credentialing is another way to portray a professional image. When a health care worker receives such accreditation, employers and the public can be assured that an academic standard is met and that the person holds a certain body of knowledge. It also advances the profession, meets the requirements of government regulators, and demonstrates an individual's commitment to a profession. The medical assistant receives a sense of pride and professional accomplishment when obtaining a credential.

Many of these organizations offer student membership and may have regional chapters.

TABLE 1-2 Certification and Registration

Title and Abbreviation	Description to Obtain Certification or Registration	Professional Association
Certified Bookkeeper (CB)	Self-study program and employment experience; pass national examination	American Institute of Professional Bookkeepers (AIPB)
Certified Coding: • Associate (CCA) • Specialist (CCS) • Specialist—Physician based (CCS-P)	Self-study program; pass certification examination	American Health Information Management Association (AHIMA)
Certified in Health Care Compliance (CHC)	Work experience, continuing education, and pass examination	Health Care Compliance Association (HCCA)
Certified Medical Assistant (CMA [AAMA])	Graduate from accredited medical assisting program; apply to take national certifying examination	American Association of Medical Assistants (AAMA)
Certified Medical Billing Specialist (CMBS)	Take six online courses and pass test	Medical Association of Billers (MAB)
Certified Medical Manager (CMM)	Minimum of 3 years' experience Twelve college credit hours 200 multiple-choice questions	Professional Association of Health Care (PAHC)
Certified Medical Practice Executive (CMPE)	Two years' experience managing a medical practice	Medical Group Management Association (MGMA)
Medical Transcriptionist Level 1: Registered Healthcare Documentation Specialist (RHDS) Level 2: Certified Healthcare Documentation Specialist (CHDS) Level 3: AHDI Fellow	Level 1: Graduate of MT program Level 2: Two years' transcription experience Level 3: Earn 50 fellowship points in five of eight categories	Association for Healthcare Documentation Integrity (AHDI)
Certified Professional Biller (CPB) Certified Professional Coder (CPC) Certified Professional Coder—Hospital Outpatient (CPC-H) Certified Professional Coder-Payer (CPC-P) Other Specialty Certifications Available	Independent study program; examination approximately 5 hours and 40 minutes in length	American Academy of Professional Coders (AAPC)
National Certified Insurance and Coding Specialist (NCICS) National Certified Medical Assistant (NCMA) National Certified Medical Office Assistant (NCMOA) National Certified Patient Care Technician (NCPCT)	Qualify to sit for certification examination given by independent testing agency at many school sites across the nation with one of the following criteria: 1. Current student or graduate from an authorized school or military institution 2. One-year experience 3. Recognition of related credential	National Center for Competency Testing (NCCT)