Courses of Study

For

Medical Office Management

Courses in the Business and Administrative Services

- Business Foundations 141000
- Office Management 142005
- Medical Office Management 142015
- Fundamentals of Business and Administrative Services 142000
- Business and Administrative Services Capstone 142045

CTPD 023

WEST SHORE CAREER -TECHNICAL DISTRICT
LAKEWOOD, OHIO 44107

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Acknowledgements
Medical Office Management
West Shore Career - Technical District

Sincere appreciation goes to the following individuals for their assistance and cooperation in preparing this Medical Office Management program's course of study.

Example:

Lakewood Board of Education, Lakewood City Schools
Mr. Jeffrey Patterson, Superintendent, Lakewood City Schools
Mr. Keith Ahearn, Lakewood High School Principal
Linda Thayer, Coordinator, West Shore Career and Technical
Mrs. Dolores Martin, Instructor, Medical Office Management

And the Medical Office Management Advisory Committee:

Buki Ukshini	Former Student, Industry-North Coast Health, Employer	Angel Dickson	Former student—now post-secondary
Megan Gogol	Former Student, Industry—Metro Health	Tianna Gray	Former student, Industry—Cleveland Clinic
Nina DeChant	Counselor	Lisa Wingle	Former parent
Maureen Zenda	Present Parent, Industry—Cleveland Clinic	Brittany Pearsall	Higher education
Kristen Zenda	Present Student	Amy Mahnke	Former student, now nursing student
Maria Keane	Industry/Employer—Dr. Kilroy, MD office		

For her helpful suggestions and encouragement: Donna Richmond, Retired Professor Kent State University

Recommendation of Advisory Committee
Medical Office Management
West Shore Career & Technical District

The Career & Technical Advisory Committee of the Medical Office Management Program, West Shore Career & Technical District, has reviewed this course of study and recommends it for use as the foundation for instruction in classroom, laboratory, and cooperative occupational experiences.

The developers of the course of study have considered local labor market needs and the school district's ability to offer specialized programs. The competencies found in the medical office management content standards for this program have been reviewed and accepted as being congruent with our school district's philosophy and student Outcome/I CAN measures.

We believe that this course of study adequately and correctly focuses upon the development of technical competencies, attitudes, values, and appreciation's critical to successful employment in the business realm.

After reviewing this document, we recommend that the Medical Office Management Course of Study be approved and adopted on 5/15/15.
(Date)

Resolution
Medical Office Management
West Shore Career & Technical District

WHEREAS, the Medical Office Management Advisory Committee of the Lakewood City Schools has reviewed the Medical Office Management Course of Study, and WHEREAS, the course of study is based upon the Career Content Standards Competencies for Business and Administrative Services

- Business Foundations 141000
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WHEREAS, the Medical Office Management Advisory Committee has reviewed these competencies and has edited competencies to address local labor market needs, and to acknowledge the school district's ability to offer specialized programs,

NOW, THEREFORE, BE IT RESOLVED, in accordance with the superintendent's recommendation, that the *Lakewood City Schools* adopt the Medical Office Management Course of Study.

Approval date: 7/20/15

Superintendent

Board President

MISSION STATEMENTS
Medical Office Management
WEST SHORE CAREER AND TECHNICAL EDUCATION DISTRICT

Mission of Lakewood City Schools

In partnership with our families and community, Lakewood City Schools will develop responsible citizens, who are critical and creative thinkers, committed to life-long learning, invested in a diverse society, and prepared for technological and global opportunities.

West Shore Career Technical District Mission Statement

The many enhancements to the West Shore Career-Technical District facility, technology, and curriculum support the ongoing mission of our teachers, administration, and staff to provide excellent educational opportunities and meaningful real-world experiences while preparing students for success in the global marketplace of the 21st century.

CAREER AND TECHNICAL EDUCATION GOALS
Medical Office Management
WEST SHORE CAREER AND TECHNICAL EDUCATION DISTRICT

- Offer relevant, hands-on learning opportunities which align with student career interests and regional workforce development needs
- Prepare career-tech student for post-secondary opportunities or to directly enter the workforce.
- Maintain active advisory committees which offer overall curriculum direction and specific occupational knowledge of competencies required for each industry specific committee
- Offer career exploration opportunities to expose students to career
- Upgrade career-technical labs to align with industry standards
- Provide on-going industry training and development opportunities for career-tech staff to stay abreast of industry advancements and teaching methods.

PROGRAM DESIGN
Medical Office Management
WESTSHORE CAREER AND TECHNICAL EDUCATION DISTRICT

PROGRAM PHILOSOPHY:

We believe that the students who study a Medical Office Management program will be prepared for employment in a variety of medical office and healthcare management settings. The curriculum included skills that are critical to success in a medical office, i.e. professionalism, communication skills, front office management, insurance claims management, medical office ethics; other management sectors included are: financial operations, human resources, marketing, information systems, risk management, organization, and clinical operations management

PROGRAM GOALS:

Program goals for students attending the West shore Career and Technical school include:

- Students will develop the skills, knowledge, attitudes, and values sufficient to secure employment and/or pursue post-secondary education in the field of their choice.
- Students will develop, expand, and refine math, science, and communication skills through application appropriate to the world of work and necessary for everyday success.
- Student will demonstrate occupational competencies at a level of proficiency acceptable to the employment market and to demonstrate the ability to adapt, retrain, and advance in an ever changing work environment.
- Students will demonstrate an understanding of positive work ethics, attitude, self-concept, and preserve mental and physical health as it relates to the processes of managing work, family, and use of leisure time.
- Students will demonstrate communication and basic computer operations skills to solve problems that will be encountered on a day to day basis
- Students will receive exposure to "high tech" procedures needed to meet the demands of business and industry.
- Students will value the free enterprise system and know they are able to work as entrepreneurs as well as employers.
- Students who are educationally, economically, and/or physically disadvantaged are mainstream unless the disability prevents the student from benefiting from the program or creates a significant safety hazard to self or other students

Overview of Program

This is a two-year program. The medical profession is complex and demanding. The typical physical has time to attend to the administrative responsibilities of the office and are turning toward administrative assistants to schedule patients, maintain medical communications, manage financial records, perform procedural and diagnostic coding and monitor third party guidelines and reimbursements. Senior students will be scheduled for internships in the medical field. With the available Tech Prep option, students can earn up to six college semester credit hours while in high school.

In the 11th and 12th grade component of the Tech Prep program, all students are part of a seamless curriculum, which allows student to transition into post-secondary programs. Each competency and competency builder in the required curriculum is designated to be introduced, reinforced, or mastered at various levels. The five areas of instruction include

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Throughout the school year, students participate in a variety of work-based learning in order to observe and interact with employees, employers and administrative personnel in order to learn more about the industry as a whole. Early placement/ internships/ mentoring assignments/ job shadowing are all examples of work-based opportunities.

Students are encouraged to take the proper classes so that they are prepared for their next step in their educational careers. The following pathway chart is a recommended sequence for students interested in this career field of medical office management.

9th Grade	10th Grade	11th Grade	12th Grade
English 9	English 10	English 11	English 12
Algebra 1 or Geometry	Geometry or Algebra II	Algebra II or Pre-Calculus	Government
Physical Science	Biology	Chemistry or Physics	Finance Foundations
World History	US History	Social Studies Elective	Elective
Foreign Language	Foreign Language	Business Foundations Office Management	Medical Office Management Fundamentals of Business and Administrative Services Business and Administrative Services Capstone
Computer Applications/ Digital Media	Finance Foundations/ Computer Applications		
Music/ Art/ PE	Music/Art /PE		
	Health	Computer Programming/Literacy	

Population Served

The Medical Office Management program is open to all 11th and 12th grade students as long as they are not a safety hazard to self and others in the class who have successfully completed Algebra I as a prerequisite. Students from the West Shore consortium are eligible to enroll in these programs as well. The school districts are Rocky River, Bay Village, Lakewood, and Westlake.

Housing of the Program

- Classroom and laboratory
- Fieldtrips to provide learning experiences outside the classroom
- Partnership with business to provide an additional hands-on training
- Early placement also provides learning experiences outside the classroom

Supervisor of the Program

The teacher of the Medical Office Management program report directly to the West Shore Career and Technical Director

Occupations Addressed

High School Exit Careers	Associate Degree Exit Careers	Baccalaureate Degree Exit Careers
Medical Office Assistant	Medical Accounts Specialist	Benefits Coordinator
Office Receptionist	Medical Records Technician	Medical Unit Coordinator
File Clerk	Medical Insurance Specialist	Medical Compliance Coordinator
Claims Processor	Medical Billing Specialist	Medical and Health Services Manager

Basic Program Operation

Provide classroom instruction and external internship experience. Develop fundamental knowledge, skills, abilities, values, and attitudes in entrepreneurship, leadership, and employability skills. In the junior year, class is 80 minutes a day for a total of 6.6 hours per week in the junior year. During the senior year, class meets for 120 minutes a day. Qualifying students are given the opportunity to secure an internship in an actual medical setting for a total of 10 hours per week in the 12th grade year.

Articulation Agreements

Articulation agreements have been developed between West Shore Career and Technical District and Cuyahoga Community College. There is on-going dialogue following the established process and procedures between our school and each participating post-secondary institution to develop and maintain articulation agreements. The procedure can include post-secondary options, waiver of classes or other formats providing time-shortened or advanced skill associate degree paths.

Technology

Technology is an integral part of the Medical Office Management program. Computer hardware and software are maintained as state-of-the-art Instructional delivery of curriculum through technology is the norm for this class.

Integrated Academics

Academics are taught outside the CTE program by a licensed teacher; however, they are integrated as part of this program in order to raise standards. Math, Science, English and Communications skills are essential and integral parts of the program competencies.

Student Leadership

It is anticipated that students will:

- participate in club related activities
- works with classmates on service projects
- develop teamwork skills

Critical Thinking and Decision Making

- Develops the use of critical thinking skills in making wise decisions as an integral part of classroom instruction and laboratory learning activities
- Teaches decision-making techniques through problem solving, case studies, and real life experiences

Statement of Modifications

Significant academic accommodations and/or modifications of competency to the Medical Office Management curriculum may limit or prevent successful training and/or future employment options in this area. Also accommodations and/or modification necessary for physical limitations and/or social work behaviors may also limit or prevent successful training and/or future employment options in this area

Disclaimer Statement

This Course of Study conforms to all federal, state and local laws and regulations including Title IX and non-discrimination against any student because of race, color, creed, sex, religion, citizenship, economic status, married status, pregnancy, handicap, other physical characteristics, age or national origin. This policy of nondiscrimination shall also apply to otherwise qualify handicapped individuals.

SCOPE AND SEQUENCE

BUSINESS FOUNDATIONS

141000

Taught in Junior Year

This is the first course for the Business and Administrative Services, Finance and Marketing career fields. It introduces students to specializations within the three career fields. Students will obtain knowledge and skills in fundamental business activities. They will acquire knowledge of business processes, economics and business relationships. Students will use technology to synthesize and share business information. Employability skills, leadership and communications and personal financial literacy will be addressed.

SCOPE AND SEQUENCE

BUSINESS FOUNDATIONS

WEST SHORE CAREER AND TECHNICAL DISTRICT

Outcome/ I CAN	1.1	**Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.
Competencies	1.1.1	Identify the knowledge, skills and abilities necessary to succeed in careers.
	1.1.2	Identify the scope of career opportunities and the requirements for education, training, certification, licensure, and experience.
	1.1.3	Develop a career plan that reflects career interests, pathways, and secondary and postsecondary options.
	1.1.6	Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community and workplace roles.
	1.1.11	Recognize different cultural beliefs and practices in the workplace and demonstrate respect for them.

Outcome/ I CAN	**1.2**	**Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.
Competencies	1.2.3	Identify and use verbal, nonverbal, and active listening skills to communicate effectively.
	1.2.5	Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.
	1.2.6	Use proper grammar and expression in all aspects of communication.
	1.2.10	Use interpersonal skills to provide group leadership, promote collaboration, and work in a team.

Outcome/ I CAN	**1.4**	**Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.
Competencies	1.4.2	Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).

Outcome/ I CAN	**1.6**	**Business Literacy:** Develop foundational skills and knowledge in entrepreneurship, financial literacy and business operations.

Competencies	1.6.4 Identify types of businesses, ownership, and entities (i.e., individual proprietorships, partnerships, corporations, cooperatives, public, private, profit, not-for-profit). 1.6.7 Identify the effect of supply and demand on products and services.

Outcome/ I CAN	**1.9 Financial Management:** Use financial tools, strategies and systems to develop, monitor, and control the use of financial resources to ensure personal and business financial well-being.
Competencies	1.9.1 Create, analyze, and interpret financial documents (e.g., budgets, income statements). 1.9.2 Identify tax obligations. 1.9.4 Identify credit types and their uses in order to establish credit. 1.9.5 Identify ways to avoid or correct debt problems. 1.9.6 Explain how credit ratings and the criteria lenders use to evaluate repayment capacity affect access to loans. 1.9.7 Review and summarize categories (types) of insurance and identify how insurances can reduce financial risk. 1.9.8 Identify income sources and expenditures. 1.9.9 Compare and contrast different banking services available through financial institutions.

SCOPE AND SEQUENCE

OFFICE MANAGEMENT

142005

Taught in Junior Year

Students will apply techniques used to manage people and information in a business environment. Students will learn to build relationships with clients, employees, peers and stakeholders and to assist new employees. They will manage business records, gather and disseminate information, and preserve critical artifacts. They will also examine contracts, internal controls and compliance requirements. Business office tools and applications will be emphasized.

SCOPE AND SEQUENCE

OFFICE MANAGEMENT

WEST SHORE CAREER AND TECHNICAL DISTRICT

Outcome/ I CAN	**1.1**	**Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.
Competencies	1.1.2	Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.
	1.1.4	Describe the role and function of professional organizations, industry associations and organized labor and use networking techniques to develop and maintain professional relationships.
	1.1.7	Apply problem-solving and critical-thinking skills to work-related issues when making decisions and formulating solutions.
	1.1.8	Identify the correlation between emotions, behavior and appearance and manage those to establish and maintain professionalism.
	1.1.9	Give and receive constructive feedback to improve work habits.
	1.1.10	Adapt personal coping skills to adjust to taxing workplace demands.

Outcome/ I CAN	**1.2**	**Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.
Competencies	1.2.3	Identify and use verbal, nonverbal, and active listening skills to communicate effectively.
	1.2.4	Use negotiation and conflict-resolution skills to reach solutions.
	1.2.5	Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.
	1.2.7	Use problem-solving and consensus-building techniques to draw conclusions and determine next steps.
	1.2.9	Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).
	1.2.11	Write professional correspondence, documents, job applications and resumés.
	1.2.12	Use technical writing skills to complete forms and create reports.
	1.2.13	Identify stakeholders and solicit their opinions.

Outcome/ I CAN	1.3	**Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.
Competencies	1.3.3	Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).
	1.3.8	Verify compliance with computer and intellectual property laws and regulations.

Outcome/ I CAN	1.4	**Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.
Competencies	1.4.1	Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).
	1.4.2	Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).
	1.4.3	Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.
	1.4.4	Use system hardware to support software applications.
	1.4.5	Use information technology tools to maintain, secure and monitor business records.
	1.4.6	Use an electronic database to access and create business and technical information.
	1.4.7	Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).
	1.4.8	Use electronic media to communicate and follow network etiquette guidelines.

Outcome/ I CAN	1.5	**Global Environment:** Evaluate how beliefs, values, attitudes and behaviors influence organizational strategies and goals.
Competencies	1.5.3	Use cultural intelligence to interact with individuals from diverse cultural settings.
	1.5.4	Recognize barriers in cross-cultural relationships and implement behavioral adjustments.

Outcome/ I CAN	1.8	**Operations Management:** Plan, organize and monitor an organization or department to maximize contribution to organizational goals and objectives.

Competencies	1.8.3. Analyze the performance of organizational activities and reallocate resources to achieve established goals. 1.8.4. Identify alternative actions to take when goals are not met (e.g., changing goals, changing strategies, efficiencies).

Outcome/ I CAN	**1.10 Sales and Marketing:** Manage pricing, place, promotion, packaging, positioning and public relations to improve quality customer service.
Competencies	1.10.2. Determine the customer's/client's needs and identify solutions and potential community resources.

Outcome/ I CAN	**3.1 Customer Relations:** Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships.
Competencies	3.1.1 Explain the nature of positive customer or client relations and their role in keeping customers, and describe the importance of meeting and exceeding customer expectations. 3.1.2 Compare the cost to acquire customers with the cost to maintain customers, and explain how these costs impact business strategy and influence which customers to maintain. 3.1.3 Apply a customer-service mindset in a culturally appropriate manner (e.g., respond to customer inquiries; reinforce service through effective, ongoing communication). 3.1.4 Build rapport with customers and use this rapport to inform customers about company policies, consequences of noncompliance with recommendations or requirements and service or account terminations. 3.1.5 Maintain confidentiality or privacy of internal and external customers. 3.1.6 Reinforce company's image and culture to exhibit the business's brand promise. 3.1.7 Describe the scope of customer-relationship management to show its contribution to business. 3.1.8 Build, maintain and improve relationships with customers, or clients; and promote brand and solicit new ideas and solutions using social media. 3.1.9 Identify opportunities to use crowdsourcing to engage customers or clients, to improve customer or client relationships, to promote brand and to solicit new ideas and solutions. 3.1.10 Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent.

Outcome/ I CAN	3.2	**Relationship Management:** Apply techniques and strategies to develop, maintain and grow positive relationships with employees, peers and stakeholders.
Competencies	3.2.6	Determine the nature of office politics, and overcome problems and difficulties associated with office politics and turf wars.
	3.2.7	Identify when and how to take risks to achieve objectives.
	3.2.8	Describe the nature of organizational culture and its impact on business, and interpret and adapt to a business's culture.
	3.2.9	Establish strategic relationships with others.
	3.2.10	Share best practices with key individuals and groups within and outside the business.
	3.2.11	Manage internal and external business relationships to foster positive interactions, and strategically plan and leverage business relationships for growth.
	3.2.12	Describe ways that businesses build positive employer-employee relationships.

Outcome/ I CAN	3.3	**Business Communications Management:** Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications.
Competencies	3.3.1	Identify organizational communication hierarchies, and select the appropriate communication strategy to use for the hierarchy.
	3.3.2	Explain how the content of written communications (e.g., email, text messages, chats) creates reputational, legal and regulatory exposure for organizations, and describe how to manage the risk individually and collectively.
	3.3.7	Develop, implement, monitor and adjust communications plan to meet the information needs of internal and external customers.
	3.3.8	Collaborate on and aggregate complex internal documents to create a common voice that is vision, mission and brand-consistent.

Outcome/ I CAN	4.3	**Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization.
Competencies	4.3.6	Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines.
	4.3.7	Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements,

		prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up).
	4.3.8	Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).

Outcome/ I CAN	**5.9**	**Marketing Communications:** Apply the concepts and determine the strategies needed to communicate information about products, services, images or ideas to achieve desired outcomes that support organizational goals and objectives.
Competencies	5.9.6	Implement word-of-mouth strategies to build brand and to promote products using word-of-mouth strategies.

Outcome/ I CAN	**6.2**	**Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals.
Competencies	6.2.2	Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).
	6.2.3	Monitor and audit internal records.
	6.2.4	Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements.
	6.2.5	Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner (e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts and diagrams).
	6.2.6	Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).
	6.2.10	Identify strategies for integrating technology into department or enterprise operations.

Outcome/ I CAN	**6.3**	**Business Applications:** Apply tools, processes and procedures to manage the efficient and effective use of technology to achieve organizational goals.
Competencies	6.3.2	Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.

	6.3.3	Implement collaborative or groupware and cloud computing applications (e.g., services, application, virtual environments) to facilitate projects and business operations.
	6.3.5	Research and incorporate visual, interactive and social media content into business communications.
	6.3.7	Maintain a multimedia website, and test and post website design changes.

Outcome/ I CAN	**6.4**	**Knowledge Management:** Apply systems, strategies and practices to share, organize, store, analyze and facilitate the use of a business's insights, processes, procedures and experiences as a strategic asset.
Competencies	6.4.3	Select and implement offline tools and techniques to gather, document and organize the knowledge residing with employees across the organization (e.g., relational networks, brainstorming, learning and idea capture, peer assist, learning reviews, storytelling, collaborative physical workspace, knowledge cafés, communities of practice).
	6.4.4	Select and apply online networks and tools to disseminate knowledge and effective practices (e.g., document libraries, Wikis, blogs, social networking sites or services, knowledge clusters, expert locators, collaborative virtual workspaces, interfaces).

Outcome/ I CAN	**6.6**	**Talent Acquisition:** Apply policies, procedures, and strategies to obtain the best qualified candidates for job positions in union and non-union environments while minimizing associated costs.
Competencies	6.6.5	Write and post job announcements for job openings.
	6.6.6	Screen and interview job applicants using culturally appropriate techniques.

Outcome/ I CAN	**6.7**	**Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace.
Competencies	6.7.2	Conduct human resources onboarding activities (e.g., employment eligibility verification [I-9 form], tax paperwork, contracts, benefit plans, policy orientation).
	6.7.3	Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

Outcome/ I CAN	**6.10**	**Human Resources Operations:** Develop, implement and evaluate the day-to-day policies, procedures and activities that are used to ensure efficient, effective human-resources management.
Competencies	6.10.2	Process human-resource compliance paperwork, and complete required reporting (e.g., workers' compensation claims, Occupational Safety and Health Administration [OSHA] documents, employment documents, fair medical leave, disability, unemployment).

Outcome/ I CAN	**7.2**	**Sourcing and Procurement:** Implement sourcing and procurement activities to obtain resources that enable achievement of organizational goals and objectives and to enhance the organization's financial wellbeing.
Competencies	7.2.4	Manage the bid or contracting process (e.g., bid specification, vendor or supplier search, bid review, selection of vendor) to achieve business goals.

Outcome/ I CAN	**7.5**	**Facilities Management:** Plan, maintain, and monitor property and equipment to facilitate ongoing business activities.
Competencies	7.5.1	Identify routine activities for maintaining, disposing, retiring and replacing business facilities and equipment.

Outcome/ I CAN	**8.1**	**Business Process Analysis:** Conduct business process analysis to identify, analyze, and solve business problems and improve process performance.
Competencies	8.1.2	Document the process activities, records or information and systems involved in business activities (e.g., developing new products, acquiring new customers, producing inventory for sale, selling goods and services, managing people).
	8.1.3	Identify process requirements and performance expectations.
	8.1.4	Identify measurements and metrics for evaluating process effectiveness and efficiency.

Outcome/ I CAN	**8.3**	**Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project outcomes using planning and project-management tools.
Competencies	8.3.4	Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

Outcome/ I CAN	**8.4**	**Contract Oversight:** Administer contracts to achieve organizational goals and minimize risk.

Competencies	8.4.3	Identify financial arrangements in contracts and the financial information required to verify compliance with the contract terms (e.g., cost plus pricing, contingent pricing, time and materials pricing, profit-sharing, percentage-based fees).
	8.4.4	Identify contract terms that might restrict future business activity (e.g., required credit rating, maximum debt-to-equity ratio, minimum cash reserve, prohibited lease transactions, shared information).
	8.4.5	Identify contract terms that mandate reporting of financial and non-financial information, and establish processes to collect and submit required information.
	8.4.6	Develop process to monitor contract terms for compliance and to protect against breach of contract or default.
	8.4.7	Determine strategies to manage compliance of outsourced and hosted service providers.
	8.4.11	Maintain contract compliance documentation for required timeframe.

Outcome/ I CAN	**9.4**	**Internal Controls:** Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.
Competencies	9.4.1	Describe the impact of financial reporting and internal control regulations on control requirements (e.g., Sarbanes-Oxley Act of 2002, Dodd-Frank Wall Street Reform Act, Model Audit Rule, Government Accountability Standards).
	9.4.4	Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls).
	9.4.5	Inspect and ensure the continued functioning of internal controls.
Outcome/ I CAN	**9.5**	**Financial Accounting:** Track, record, and summarize financial transactions to enable accurate reporting of financial activity to external parties.
Competencies	9.5.11	Perform procedures to validate accuracy of accounting data, to identify errors and to make corrections (e.g., review trial balance, reconcile cash, proof ledgers, count inventory).
	9.5.14	Identify and preserve accounting information in compliance with regulations and policies.

SCOPE AND SEQUENCE

MEDICAL OFFICE MANAGEMENT

142015

Taught in Senior Year

Students will carry out procedures used to manage people and information in medical offices. Students will code medical procedures in accordance with applicable guidelines as well as use technology to convert patient information to electronic medical records. They will also manage the insurance billing and collection process, utilize a patient scheduling and registration system, and develop a compliance program. Medical office safety and security will be emphasized.

SCOPE AND SEQUENCE

MEDICAL OFFICE MANAGEMENT

WEST SHORE CAREER AND TECHNICAL DISTRICT

Outcome/ I CAN	**1.1**	**Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.
Competencies	1.1.2	Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.
	1.1.6	Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community and workplace roles.

Outcome/ I CAN	**1.2**	**Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.
Competencies	1.2.3	Identify and use verbal, nonverbal, and active listening skills to communicate effectively.
	1.2.5	Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.
	1.2.9	Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).
	1.2.12	Use technical writing skills to complete forms and create reports.

Outcome/ I CAN	**1.3**	**Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.
Competencies	1.3.2	Follow protocols and practices necessary to maintain a clean, safe and healthy work environment.
	1.3.3	Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).
	1.3.5	Access and implement safety compliance measures (e.g., quality assurance information, safety data sheets [SDSs], product safety data sheets [PSDSs], United States Environmental Protection Agency [EPA], United States Occupational Safety and Health Administration [OSHA]) that contribute to the continuous improvement of the organization.
	1.3.8	Verify compliance with computer and intellectual property laws and regulations.

Outcome/ I CAN e	1.4	**Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.
Competencies	1.4.1	Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).
	1.4.2	Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).
	1.4.3	Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.
	1.4.4	Use system hardware to support software applications.
	1.4.5	Use information technology tools to maintain, secure and monitor business records.
	1.4.6	Use an electronic database to access and create business and technical information.
	1.4.7	Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).
	1.4.8	Use electronic media to communicate and follow network etiquette guidelines.

Outcome/ I CAN	3.1	**Customer Relations:** Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships.
Competencies	3.1.5	Maintain confidentiality or privacy of internal and external customers.
	3.1.6	Reinforce company's image and culture to exhibit the business's brand promise.
	3.1.7	Describe the scope of customer-relationship management to show its contribution to business.
	3.1.10	Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent.
Outcome/ I CAN	3.4	**Social Media Communications:** Apply tools, strategies and processes to plan, create, implement, monitor and evaluate social media communications to support corporate brand and strategy.
Competencies	3.4.2	Compare and contrast the use of social media for personal and business purposes.

Outcome/ I CAN	4.3	**Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization.

Competencies	4.3.3	Explain the elements of a compliance program and how requirements and expectations differ across industry sectors (e.g., financial services, healthcare, consumer products, restaurants and food and beverages, etc.).
	4.3.5	Develop the elements of a basic compliance program to promote consistent behaviors (e.g., policies, procedures, training).
	4.3.6	Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines.
	4.3.7	Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up).
	4.3.8	Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).

Outcome/ I CAN	**4.6**	**Corporate Social Responsibility (CSR):** Interpret, apply and communicate an organization's ethics and social responsibility policies and code of conduct in routine and ambiguous situations.
Competencies	4.6.2	Compare and contrast ethical challenges across industry sectors (e.g., healthcare, financial services, consumer products, manufacturing, retail) and functional areas (e.g., marketing, human resources, financial reporting).

Outcome/ I CAN	**6.2**	**Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals.
Competencies	6.2.1	Apply information literacy skills to assess information needs, identify and evaluate information quality (e.g., sufficiency, trustworthiness or reliability), and apply information to accomplish a task.
	6.2.2	Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).
	6.2.3	Monitor and audit internal records.
	6.2.4	Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements.
	6.2.5	Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner

		(e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts and diagrams).
	6.2.6	Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).
	6.2.9	Create and institute policies and procedures to protect data and intangibles.

Outcome/ I CAN	**6.3**	**Business Applications:** Apply tools, processes and procedures to manage the efficient and effective use of technology to achieve organizational goals.
Competencies	6.3.2	Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.
	6.3.10	Manage data change risks (e.g., change authorization, change documentation, spreadsheet controls, test databases, offsite backups).

Outcome/ I CAN	**6.7**	**Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace.
Competencies	6.7.3	Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

Outcome/ I CAN	**7.1**	**Safety, Health and Security:** Develop, administer and manage policies and procedures to promote business safety, health, and security and to reduce risk of loss.
Competencies	7.1.1	Promote adherence to health and safety regulations to support a safe work environment.
	7.1.2	Identify needed safety and security policies and procedures to protect organizational stakeholders (e.g., employees, contractors, directors and officers, customers, guests and visitors).
	7.1.3	Identify types of hazardous materials, and describe their impact on human health and environmental resources.
	7.1.4	Describe the requirements for the treatment, storage, and disposal of hazardous materials, and evaluate the impact of hazardous material releases on organizational performance.
	7.1.5	Identify strategies for protecting business's digital assets, customer data, and other confidential business information.

	7.1.6	Develop policies, procedures, performance aids, and monitoring activities to promote and support workplace security goals established within safety and security plans.

Outcome/ I CAN	**7.4**	**Quality Management:** Design, implement, and manage quality-control processes to minimize errors, expedite workflow, and achieve performance objectives at a reasonable cost, using continuous improvement techniques (e.g., lean, Six Sigma or DMAIC [Define, Measure, Analyze, Improve, Control]).
Competencies	7.4.3	Evaluate the impact of quality on internal and external brand experience, reputation, financial performance (e.g., healthcare reimbursement), procurement and sourcing options, and process design.

Outcome/ I CAN	**7.8**	**Operations Risk Management:** Identify and execute strategies to reduce the risk of loss from operational failures to acceptable levels.
Competencies	7.8.1	Compare the costs of routine operational failures (e.g., execution errors, accidents, processing failures) with non-routine operational failures (e.g., fraud, conscious violation of professional ethics, acts of nature).
	7.8.3	Describe strategies for reducing the risk of routine and non-routine operational risk as staffing size and organizational complexity increase (e.g., automation, procedures, checklists).
	7.8.6	Develop alternative strategy for performing operational duties in a disaster situation.

Outcome/ I CAN	**8.3**	**Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project outcomes using planning and project-management tools.
Competencies	8.3.4	Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

Outcome/ I CAN	**8.6**	**Medical Operations:** Develop foundational skills and knowledge to execute the operational processes in medical offices.
Competencies	8.6.1	Register, screen, and direct patients and non-patient visitors.
	8.6.2	Adapt patient handling approach to address cultural needs of different patient groups (e.g., elderly, non-native English speaking).
	8.6.3	Prepare data for a referring physician.
	8.6.4	Recognize and respond to medical emergencies based on protocols, standard triage procedures, and first aid and cardiopulmonary resuscitation (CPR) practices.

	8.6.5 Conduct telephone triage procedures to obtain information required to identify urgency of needs and properly direct phone calls. 8.6.6 Determine the cause of denied insurance claims, and recommend follow-up actions to resolve claims. 8.6.7 Process payments on accepted insurance claim, and post adjustments and write-offs. 8.6.8 Initiate procedures to collect remaining balances (e.g., bill patient responsibility, initiate secondary insurance claim). 8.6.9 Analyze and establish fee schedules and discounts. 8.6.10 Manage a scheduling and registration system (e.g., monitor patient flow, verify insurance coverage, confirm appointments, process referrals). 8.6.11 Complete and maintain the medical office credentialing process. 8.6.12 Prepare for on-site inspection by credentialing authority.

Outcome/ I CAN	**8.7** **Medical Coding and Billing:** Code and bill medical procedures in accordance with applicable requirements and guidelines.
Competencies	8.7.1 Explain the need for standardized patient terminology in insurance coding and processing. 8.7.2 Identify coding conventions used to obtain standardization. 8.7.3 Explain the health-care insurance system and factors impacting processing and payment of insurance claims (e.g., eligibility, insurance networks, primary and secondary providers). 8.7.4 Identify the appropriate section of authorized resources (e.g., ICD-10-CM alphabetical index and tabular list) to locate and assign a code at the highest level of detail required for the code to be valid. 8.7.5 Identify condition modifiers that impact code selection (e.g., acute or chronic condition, late effects, secondary manifestations or complications, threatened condition, laterality, syndromes). 8.7.6 Identify diagnoses and conditions that have specific coding guidelines in addition to general guidelines (e.g., Human Immunodeficiency Virus [HIV], antibiotic resistant infections, sepsis, neoplasms, blood diseases), and evaluate factors influencing the reporting and collection of data on these diagnoses or conditions. 8.7.7 Code diseases for human anatomical systems (e.g., endocrine, nervous, circulatory, respiratory, digestive, musculoskeletal). 8.7.8 Code obstetric and perinatal conditions and progressions. 8.7.9 Code external causes of injury, poisoning, and morbidity. 8.7.10 Code outpatient services. 8.7.11 Distinguish between principal diagnosis and additional diagnoses.

	8.7.12 Complete required procedures and insurance forms for private insurance carriers, self-pay patients, and government-insured patients using the coding of the International Classification of Diseases (ICD10) and Current Procedural Terminology (CPT) coding systems. 8.7.13 Identify required data elements, and manage the conversion of patient information to electronic medical records (e.g., manage data collection; process consent forms; input, review, edit documents).

Outcome/ I CAN	**9.4 Internal Controls:** Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.
Competencies	9.4.4 Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls). 9.4.5 Inspect and ensure the continued functioning of internal controls.

Outcome/ I CAN	**10.3 Change Management:** Adapt to, manage, and create change initiatives in an organization to accomplish organizational objectives.
Competencies	10.3.4 Evaluate opportunities for company or departmental changes.

SCOPE AND SEQUENCE

FUNDAMENTALS OF BUSINESS AND ADMINSTRATIVE SERVICES

142000

Taught in Senior Year

This is the first course specific to the Business and Administrative Services career field. It introduces students to the specializations offered in Business and Administrative Services. Students will obtain fundamental knowledge and skills in general management, human resources management, operations management, business informatics and office management. They will acquire knowledge of business operations, business relationships, resource management, process management and financial principles. Students will use technological tools and applications to develop business insights.

SCOPE AND SEQUENCE

FUNDAMENTALS OF BUSINESS AND ADMINSTRATIVE SERVICES

WEST SHORE CAREER AND TECHNICAL DISTRICT

Outcome/ I CAN	**1.1**	**Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.
Competencies	1.1.2	Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.
	1.1.6	Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community and workplace roles.

Outcome/ I CAN	**1.2**	**Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.
Competencies	1.2.3	Identify and use verbal, nonverbal, and active listening skills to communicate effectively.
	1.2.5	Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.
	1.2.9	Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).
	1.2.12	Use technical writing skills to complete forms and create reports.

Outcome/ I CAN	**1.3**	**Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.
Competencies	1.3.2	Follow protocols and practices necessary to maintain a clean, safe and healthy work environment.
	1.3.3	Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).
	1.3.5	Access and implement safety compliance measures (e.g., quality assurance information, safety data sheets [SDSs], product safety data sheets [PSDSs], United States Environmental Protection Agency [EPA], United States Occupational Safety and Health Administration [OSHA]) that contribute to the continuous improvement of the organization.

	1.3.8	Verify compliance with computer and intellectual property laws and regulations.

Outcome/ I CAN	**1.4**	**Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.
Competencies	1.4.1	Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).
	1.4.2	Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).
	1.4.3	Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.
	1.4.4	Use system hardware to support software applications.
	1.4.5	Use information technology tools to maintain, secure and monitor business records.
	1.4.6	Use an electronic database to access and create business and technical information.
	1.4.7	Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).
	1.4.8	Use electronic media to communicate and follow network etiquette guidelines.

Outcome/ I CAN	**3.1**	**Customer Relations:** Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships.
Competencies	3.1.5	Maintain confidentiality or privacy of internal and external customers.
	3.1.6	Reinforce company's image and culture to exhibit the business's brand promise.
	3.1.7	Describe the scope of customer-relationship management to show its contribution to business.
	3.1.10	Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent.
Outcome/ I CAN	**3.4**	**Social Media Communications:** Apply tools, strategies and processes to plan, create, implement, monitor and evaluate social media communications to support corporate brand and strategy.
Competencies	3.4.2	Compare and contrast the use of social media for personal and business purposes.

Outcome/ I CAN	**4.3**	**Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization.
Competencies	4.3.3	Explain the elements of a compliance program and how requirements and expectations differ across industry sectors (e.g., financial services, healthcare, consumer products, restaurants and food and beverages, etc.).
	4.3.5	Develop the elements of a basic compliance program to promote consistent behaviors (e.g., policies, procedures, training).
	4.3.6	Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines.
	4.3.7	Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up).
	4.3.8	Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).

Outcome/ I CAN	**4.6**	**Corporate Social Responsibility (CSR):** Interpret, apply and communicate an organization's ethics and social responsibility policies and code of conduct in routine and ambiguous situations.
Competencies	4.6.2	Compare and contrast ethical challenges across industry sectors (e.g., healthcare, financial services, consumer products, manufacturing, retail) and functional areas (e.g., marketing, human resources, financial reporting).

Outcome/ I CAN	**6.2**	**Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals.
Competencies	6.2.1	Apply information literacy skills to assess information needs, identify and evaluate information quality (e.g., sufficiency, trustworthiness or reliability), and apply information to accomplish a task.
	6.2.2	Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).
	6.2.3	Monitor and audit internal records.
	6.2.4	Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements.

	6.2.5	Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner (e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts and diagrams).
	6.2.6	Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).
	6.2.9	Create and institute policies and procedures to protect data and intangibles.

Outcome/ I CAN	**6.3**	**Business Applications:** Apply tools, processes and procedures to manage the efficient and effective use of technology to achieve organizational goals.
Competencies	6.3.2	Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.
	6.3.10	Manage data change risks (e.g., change authorization, change documentation, spreadsheet controls, test databases, offsite backups).

Outcome/ I CAN	**6.7**	**Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace.
Competencies	6.7.3	Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

Outcome/ I CAN	**7.1**	**Safety, Health and Security:** Develop, administer and manage policies and procedures to promote business safety, health, and security and to reduce risk of loss.
Competencies	7.1.1	Promote adherence to health and safety regulations to support a safe work environment.
	7.1.2	Identify needed safety and security policies and procedures to protect organizational stakeholders (e.g., employees, contractors, directors and officers, customers, guests and visitors).
	7.1.3	Identify types of hazardous materials, and describe their impact on human health and environmental resources.
	7.1.4	Describe the requirements for the treatment, storage, and disposal of hazardous materials, and evaluate the impact of hazardous material releases on organizational performance.

	7.1.5	Identify strategies for protecting business's digital assets, customer data, and other confidential business information.
	7.1.6	Develop policies, procedures, performance aids, and monitoring activities to promote and support workplace security goals established within safety and security plans.

Outcome/ I CAN	**7.4**	**Quality Management:** Design, implement, and manage quality-control processes to minimize errors, expedite workflow, and achieve performance objectives at a reasonable cost, using continuous improvement techniques (e.g., lean, Six Sigma or DMAIC [Define, Measure, Analyze, Improve, Control]).
Competencies	7.4.3	Evaluate the impact of quality on internal and external brand experience, reputation, financial performance (e.g., healthcare reimbursement), procurement and sourcing options, and process design.

Outcome/ I CAN	**7.8**	**Operations Risk Management:** Identify and execute strategies to reduce the risk of loss from operational failures to acceptable levels.
Competencies	7.8.1	Compare the costs of routine operational failures (e.g., execution errors, accidents, processing failures) with non-routine operational failures (e.g., fraud, conscious violation of professional ethics, acts of nature).
	7.8.3	Describe strategies for reducing the risk of routine and non-routine operational risk as staffing size and organizational complexity increase (e.g., automation, procedures, checklists).
	7.8.6	Develop alternative strategy for performing operational duties in a disaster situation.

Outcome/ I CAN	**8.3**	**Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project Outcome/I CANs using planning and project-management tools.
Competencies	8.3.4	Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

Outcome/ I CAN	**8.6**	**Medical Operations:** Develop foundational skills and knowledge to execute the operational processes in medical offices.
Competencies	8.6.1	Register, screen, and direct patients and non-patient visitors.
	8.6.2	Adapt patient handling approach to address cultural needs of different patient groups (e.g., elderly, non-native English speaking).
	8.6.3	Prepare data for a referring physician.

	8.6.4 Recognize and respond to medical emergencies based on protocols, standard triage procedures, and first aid and cardiopulmonary resuscitation (CPR) practices. 8.6.5 Conduct telephone triage procedures to obtain information required to identify urgency of needs and properly direct phone calls. 8.6.6 Determine the cause of denied insurance claims, and recommend follow-up actions to resolve claims. 8.6.7 Process payments on accepted insurance claim, and post adjustments and write-offs. 8.6.8 Initiate procedures to collect remaining balances (e.g., bill patient responsibility, initiate secondary insurance claim). 8.6.9 Analyze and establish fee schedules and discounts. 8.6.10 Manage a scheduling and registration system (e.g., monitor patient flow, verify insurance coverage, confirm appointments, process referrals). 8.6.11 Complete and maintain the medical office credentialing process. 8.6.12 Prepare for on-site inspection by credentialing authority.

Outcome/ I CAN	**8.7** **Medical Coding and Billing:** Code and bill medical procedures in accordance with applicable requirements and guidelines.
Competencies	8.7.1 Explain the need for standardized patient terminology in insurance coding and processing. 8.7.2 Identify coding conventions used to obtain standardization. 8.7.3 Explain the health-care insurance system and factors impacting processing and payment of insurance claims (e.g., eligibility, insurance networks, primary and secondary providers). 8.7.4 Identify the appropriate section of authorized resources (e.g., ICD-10-CM alphabetical index and tabular list) to locate and assign a code at the highest level of detail required for the code to be valid. 8.7.5 Identify condition modifiers that impact code selection (e.g., acute or chronic condition, late effects, secondary manifestations or complications, threatened condition, laterality, syndromes). 8.7.6 Identify diagnoses and conditions that have specific coding guidelines in addition to general guidelines (e.g., Human Immunodeficiency Virus [HIV], antibiotic resistant infections, sepsis, neoplasms, blood diseases), and evaluate factors influencing the reporting and collection of data on these diagnoses or conditions. 8.7.7 Code diseases for human anatomical systems (e.g., endocrine, nervous, circulatory, respiratory, digestive, musculoskeletal). 8.7.8 Code obstetric and perinatal conditions and progressions. 8.7.9 Code external causes of injury, poisoning, and morbidity.

	8.7.10 Code outpatient services. 8.7.11 Distinguish between principal diagnosis and additional diagnoses. 8.7.12 Complete required procedures and insurance forms for private insurance carriers, self-pay patients, and government-insured patients using the coding of the International Classification of Diseases (ICD10) and Current Procedural Terminology (CPT) coding systems. 8.7.13 Identify required data elements, and manage the conversion of patient information to electronic medical records (e.g., manage data collection; process consent forms; input, review, edit documents).

Outcome/ I CAN	**9.4** **Internal Controls:** Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.
Competencies	9.4.4 Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls). 9.4.5 Inspect and ensure the continued functioning of internal controls.

Outcome/ I CAN	**10.3** **Change Management:** Adapt to, manage, and create change initiatives in an organization to accomplish organizational objectives.
Competencies	10.3.4 Evaluate opportunities for company or departmental changes.

SCOPE AND SEQUENCE

BUSINESS AND ADMINSTRATIVE SERVICES CAPSTONE

142045

Taught in Junior and Seniors Years

Students will apply knowledge, attitudes and skills that were learned in a Business and Administrative Services program in a more comprehensive and authentic way in this capstone course. Capstones often include project/problem-based learning opportunities that occur both in and away from school. Under supervision of the school and through community partnerships, students may combine classroom learning with work experience. This course can be delivered through a variety of delivery methods including cooperative education or apprenticeship.

SCOPE AND SEQUENCE

BUSINESS AND ADMINSTRATIVE SERVICES CAPSTONE

WEST SHORE CAREER AND TECHNICAL DISTRICT

Employability units will be taught throughout other courses under the Employability sections. In addition, students that are eligible will be able to participate in early placement and external internships to gain valuable work experience.

STUDENT ASSESSMENT POLICY
MEDICAL OFFICE MANAGEMENT
WEST SHORE CAREER AND TECHNICAL DISTRICT

The student shall perform competencies and key indicators in a manner acceptable to the business community. The standards set for these competencies are recommended by the advisory committee members and local employers in the community and evaluated by the teacher following these guidelines. In order to receive credit for the course, competencies to be mastered must be determined by the teacher as suggested by the advisory team.

In order to measure the progress of each student in the program and to measure the effectiveness of the total program, the following procedures will be used:

- Pretests
- Post Tests
- Teacher observation and evaluation
- Notebooks
- Portfolio
- Class discussions
- Skill testing
- Project development
- Daily grades
- Lab performance
- Career techinical rules and regulations for early placement
- Industry certifications
- Work-based Learning or internships

Measurement of learning will be an ongoing activity with emphasis on laboratory activities and competency improvement. Evaluation will be accomplished through pre-assessment of students' skills, frequent formative assessment, both visual and written, and summative evaluation to determine the mastery of competencies. Formative assessments that are conducted during instruction help the teacher make necessary instructional adjustments. The instructor may decide to alter instructional materials and methods if students are experiencing difficulties in learning what is being taught. All evaluations are in the form of points received out of points possible. A percentage is then calculated and a letter grade is assigned. Each semester, a midterm exam is given, which is worth 10 percent of the final grade. Grades for all students are found online and are continuously updated.

LAKEWOOD CITY SCHOOL DISTRICT'S GRADING SCALE

97-100% = A+
93- 96% = A
90- 92% = A-
87- 89% = B+
83- 86% = B
80- 82% = B-
77- 79% = C+
73-76% = C
70-72% = C-
67-69% = D+
63-66% = D
60-62% = D-
59% or less=F

The Medical Office Management program will take the Ohio Career Technical Competency Assessments, which is a web-based exit exam, to attest to their abilities in Medical Office Management as they enter the workforce.