YOSEMITE REGIONAL OCCUPATIONAL PROGRAM

MEDICAL OFFICE OCCUPATIONS I-II

CBEDS Codes: 4275

JOB TITLES	DOT NO.
Medical Records Technician	079.362-014
Medical Clerk	205.362-018
Medical Records Clerk	245.362-010

Course description:

Medical Office Occupations is a business course, which incorporates health occupations competencies with job-specific experiences, theory (didactic) laboratory and clinical competencies.

Recommended Prerequisites: Type 25-30 WPM

DURATION: up to 360 total hours

CREDIT: 10 Units/Semester

RECOMMENDED GRADE LEVEL: 11-12, Adult

MEETS GRADUATION REQUIREMENTS IN: MEETS UNIVERSITY OF CALIFORNIA

ENTRANCE REQUIREMENTS: No

MEETS CALIFORNIA STATE UNIVERSITY REQUIREMENTS: No

Instructional Materials

Basic Text(s):

Being a Medical Clerical Worker 2nd Edition Brady, Prentice Hall;

Diversified Health Occupations 3rd Edition, Delmar Publishers

Simulating the Medical Office, 3rd Edition, Career Publishing, Inc.

Medical Terminology for Health Professionals, 2nd Edition, Delmar Publishers

Supplementary Text(s):

Being a Medical Records Clerk, Brady, 1st Edition, Prentice Hall

Being a Medical Admissions Clerk, Brady, 1st Edition, Prentice Hall

Medical Filing, 2nd Edition, Delmar Publishers

Power Building in Documentation, 1st Edition, Saunders

Health Unit Coordinating, 3rd Edition, Saunders

Business Skills Improvement Exercises, 2nd Edition, South-Western Publishing

Instructional Content Instruction will include:	Student Outcomes At the end of instruction, the student will be able to:	Anchor/ CR	CTE	CL=Classroom CC=Comm. Class.	Hours
				CL	CC
1. Socio Economic: 1. Discuss health care associations and agencies 2. Discuss various health care facilities and the services they offer. 3. Review levels of education required for a variety of positions within the medical office specialties. 4. Define/Review career ladders in the medical field. 5. Discuss employment opportunities within the medical office field. 6. Describe medical specialties. 7. Discuss/Review hospital organizational chart and the differences between services within a hospital or clinic structure. 8. Review levels of nursing. 9. Demonstrate good personal hygiene and professional appearance (dress code)	*Goal: The student will understand the inter-relationships of the health care system.* A. Identify and compare various health care associations/agencies and their functions. B. Identify and compare various health care facilities and the services they offer. C. Identify the various levels of education required for a variety of jobs within the medical office specialties. D. Discuss potential career ladders in the medical field. E. Identify and describe employment opportunities within the medical office field. F. Define and describe medical specialties. G. Demonstrate an understanding of a hospital organization chart and the differences between diagnostic, therapeutic, environmental and general services within a hospital or clinic structure. H. Describe and identify levels of nursing I. Identify and demonstrate good personal hygiene and professional appearance, adhering to a dress code.	**Anchor/ CR** 3.1-3.9 CR 3	**C1.0- C1.2 C1.5 C1.8 C2.4**	20	
2. Ethical and Legal Responsibilities 1. Review professional ethics/etiquette. 2. Discuss The Patient's Bill of Rights. 3. Describe licensing of medical personnel and the scope of practice within that license. 4. Review personal liability. 5. Discuss the Good Samaritan Act. 6. Discuss patient confidentiality and the patient confidentiality form. 7. Review current ethical issues. 8. Complete all student paperwork before they enter community classroom assignment. 9. Describe common practices in maintaining client confidentiality. 10. Demonstrate a legal chart correction.	*Goal: The student will understand ethical considerations, legal constraints and professional codes affecting health care delivery systems.* A. Define professional ethics and etiquette. B. Discuss and demonstrate an understanding of The Patient's Bill of Rights. C. Identify the needs for licensing of medical personnel and the scope of practice within that license. D. Discuss the rule of personal liability. E. Identify and discuss the good Samaritan Act. F. Demonstrate an understanding of confidentiality, and prepare a patient confidential form, through role playing. G. Discuss a current ethical issue within a group setting. H. Read and sign a confidential form prior to being assigned to a community medical office. I. Maintain confidentiality of all information, utilizing assigned areas, keeping voice audible only to listener, screening client from view for medical procedures. J. Practice a legal chart correction.	8.1-8.7 CR 7 and 8	C14.2 C14.3 C13.1- C13.4	20	

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Instructional Content	Student Outcomes	Anchor/ CR	CTE	CL	CC
3. Communication and Decision Making Skills 1. Describe appropriate techniques of verbal communication. 2. Describe human needs in the medical office setting. 3. Demonstrate patient/client communication. 4. Discuss respect and emotional concern for others. 5. Describe techniques and principles of communication. 6. Review communication skills using tact and diplomacy with clients and co-workers. 7. Review teamwork as it pertains to co-workers. 8. Review patient interviewing techniques. 9. Review non-verbal communication skills: Active listening, empathy, and constructive criticism as they relate to patients and co-workers. 10. Facilitate classroom discuss/debate and resolution of a communication issue. 11. Demonstrate communication skills with clients at their understanding level when explaining procedures.	**Goal: The student will demonstrate communication and decision-making skills within a medical office setting.** A. Define appropriate techniques of verbal communication. B. Display an understanding of human needs. C. Demonstrate communication that focuses on the patient or client. D. Demonstrate respect and emotional concern for others. E. Utilize techniques and principles of communication. F. Demonstrate verbal communication skills using tact and diplomacy with clients and co-workers. G. Demonstrate teamwork capabilities with co-workers. H. Demonstrate patient interviewing techniques. I. Demonstrate non-verbal communication skills. J. Identify/describe communication skills; active listening, empathy, and constructive criticism as they relate to patients and co-workers. K. Identify a communication issue. Debate the issue, attempting a resolution. L. Demonstrate communications skills with clients at their understanding level when explaining procedures.	3.1-3.4 4.4 2.1 2.6 5.1-5.4 CR 1,2,5,7, 8,10 and 12	C5.1-C5.3 C13.3 C7.3 C7.1	20	
4. Principles of Safety 1. Review basic safety rules as they pertain to patients and personnel. 2. Describe rules of body mechanics, including moving and transporting of patients. 3. Discuss infection control, universal precautions and principles of cross-contamination. 4. Define rules of asepsis, good hand washing techniques and removal and confinement of contaminated materials, i.e. gloves or other materials. 5. Explain International Hospital Code System. 6. Review approved techniques for choking and cardiac arrest and principles of first aide. 7. Review fire safety and types of fire extinguishers.	**Goal: The student will understand asepsis, body mechanics and protective safety measures.** A. Demonstrate basic safety rules as they pertain to patients and personnel. B. Demonstrate and apply rules of body mechanics, including moving or transporting patients. C. Define infection control, biohazard, personal protective equipment, universal precautions and principles of cross-contamination. D. Demonstrate the rules of asepsis, good hand washing, removing contaminated gloves and confining contaminated materials to designated areas. E. Identify/explain the International Hospital Code System. F. Demonstrate approved techniques for choking and cardiac arrest, and principles of first aid.	.5.1 5.2 5.3 6.0-6.10 10.5 CR 1,6,7,8, and 12		40	

Instructional Content Instruction will include:	Student Outcomes At the end of instruction, the student will be able to:	Hours CL=Classroom CC=Comm. Class.			

Instructional Content	Student Outcomes	Anchor/ CR	CTE	CL	CC
4. Principles of Safety (Continued) 8. Describe nosocomial infection, pathogens and purpose of isolation. 9. Facilitate completion of an incident report through classroom role-playing. 10. Coordinate community training in the area of medical/surgical asepsis.	G. Define fire safety and identify types of fire extinguishers. H. Discuss nosocomial infection, pathogens and purpose of isolation. I. Complete an Incident Report. J. Observe medical/surgical asepsis during community training.				
5. Health Maintenance 1. Review the meaning of client and personal wellness. 2. Describe various healthcare practices and their contribution to the quality of life. 3. Discuss preventive measures for certain high-risk behaviors, such as ergonomics, both within their workplace and in their personal lives.	**Goal: The student will have knowledge of prevention of disease processes for the maintenance of optimum health.** A. Identify the meaning of wellness, both client and personal. B. Evaluate various preventive healthcare practices and determine how they contribute to the quality of life. C. Identify and describe preventive measures for certain high-risk behaviors, such as ergonomics, both within the work environment and in their personal lives.	6.2 6.5 6.4 CR 6,7, and 1		20	
6. Patient Records 1. Discuss the purpose of a patient record. 2. Review the patient record as a legal document. 3. Define the medical office worker's responsibility toward medical records. 4. Describe a variety of filing systems 5. Discuss approved indexing rules for filing names of persons, businesses, and organizations. 6. Discuss the purpose of a patient record. 7. Review the patient record as a legal document. 8. Define the medical office worker's responsibility toward medical records. 9. Describe a variety of filing systems 10. Discuss approved indexing rules for filing names of persons, businesses, and organizations. 11. Discuss the purpose of a patient record. 12. Review the patient record as a legal document. 13. Define the medical office worker's responsibility toward medical records. 14. Describe a variety of filing systems	**Goal: The student will understand the importance of maintaining a comprehensive and accurate patient record.** A. Explain the purpose of the patient record. B. Establish the patient records as a legal document. C. Describe the medical office worker's responsibility toward medical records. D. Learn a variety of filing systems, including color codes. E. List and apply approved indexing rules for filing names of persons, businesses and organizations. F. Explain the purpose of the patient record. G. Establish the patient records as a legal document. H. Describe the medical office worker's responsibility toward medical records. I. Learn a variety of filing systems, including color codes. J. List and apply approved indexing rules for filing names of persons, businesses and organizations. K. Explain the purpose of the patient record. L. Establish the patient records as a legal document. M. Describe the medical office worker's responsibility toward medical records. N. Learn a variety of filing systems, including color codes.	8.3 8.4 8.6 8.7 10.1-10.4 2.1 2.2 2.4 2.6 CR 1,7,2,4,5,8, and 12	C8.1-C8.4 C9.1-C9.5 C10.1-C10.5	40	

Instructional Content	Student Outcomes	Anchor/CR	CTE	CL	CC
6. Patient Records (Continued) 15. Discuss the purpose of a patient record. 16. Review the patient record as a legal document. 17. Define the medical office worker's responsibility toward medical records. 18. Describe a variety of filing systems 19. Discuss approved indexing rules for filing names of persons, businesses, and organizations. 20. Discuss approved indexing, coding, cross referencing, sorting, storing and retrieving records. 21. Review approved procedures for control and retention of medical records. 22. Review types of filing equipment/supplies. 23. Monitor students' use of a compute for developing, updating and retrieving patient information. 24. Monitor students completion of standards forms. 25. Review problem-oriented patient records, subjective and objective signs. 26. Monitor student correction of medical records. 27. Review appropriate guidelines to maintain confidentiality when releasing records/information. 28. Review record system analysis, design and evaluation. 29. Discuss record control and retention systems. 30. Review protecting patient records and personnel records from unauthorized access.	O. Explain the purpose of the patient record. P. Establish the patient records as a legal document. Q. Describe the medical office worker's responsibility toward medical records. R. Learn a variety of filing systems, including color codes. S. List and apply approved indexing rules for filing names of persons, businesses and organizations. T. Demonstrate and practice approved indexing, coding, cross-referencing, sorting, storing and retrieving records alphabetically, numerically and subject. U. Describe approved procedures for control and retention of medical records. V. Identify types of filing equipment/supplies. W. Demonstrate the use of a computer for daily developing, updating and retrieval of patient information. X. Demonstrate the use of a computer for completing standards forms. Y. Describe problem-oriented patient records, subjective and objective signs. Z. Demonstrate correction of medical records. AA. Use appropriate guidelines to maintain confidentiality when releasing records and information. BB. Discuss record system analysis, design and evaluation. CC. Discuss record control and retention systems. DD. Demonstrate protecting patient records and personnel records from unauthorized access and release of information.				
7. Office Automation 1. Review computer terminology and the basic parts and functions of a computer. 2. Describe functions of a computer and data base management in medical facilities. 3. Demonstrate completion of a fax form and discuss current issues of faxing medical records. 4. Review and identify different types of computers. 5. Demonstrate features and advantages of copy machines.	*Goal: The student will demonstrate the purpose, function and operation of various types of office equipment.* A. Identify selected computer terminology and the basic parts of a computer and its functions. B. Discuss the functions of computers and data base management in medical facilities. C. Complete a fax form and discuss current issues of faxing medical records. D. Learn and identify different types of computers. E. Identify the features and advantages of copy machines.	2.1 2.2 2.4 2.6 8.1-8.5 8.7 CR 7, 1,2,4, and 5	C9.1 C9.4 C9.2 C9.3 C9.5 C10.2 C10.5	20	

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Instructional Content	**Student Outcomes**				**Hours**
Instruction will include:	At the end of instruction, the				CL=Classroom
	student will be able to:				CC=Comm. Class.

Instructional Content	Student Outcomes	Anchor/CR	CTE	CL	CC
7. Office Automation (Continued) 6. Demonstrate computer applications/software used in medical facilities. 7. Demonstrate opening, maintaining and updating of files using a computer. 8. Demonstrate printing of reports and labels. 9. Discuss micrographics, automated retrieval equipment and computer record tracking. 10. Review equipment maintenance and safety.	F. Identify and practice a variety of computer applications used in medical facilities, through the use of specialized medical software. G. Utilize a computer to open, maintain, and update files. H. Print reports and labels. I. Discuss developments in micrographics, automated retrieval equipment and computer record tracking. J. Demonstrate equipment maintenance and safety.	**Anchor/ CR**	**CTE**	**CL**	**CC**
8. Written Communications 1. Review letter styles 2. Identify parts of a letter. 3. Demonstrate proper procedures for receiving and sorting incoming mail. 4. Describe "annotation" and explain its use. 5. Discuss equipment/supplies necessary for letter writing and processing mail. 6. Demonstrate medical transcription and its skills and methods. Identify types of transcribed records and formats. 7. Proofread and edit writing samples. 8. Review postage classes/rates. 9. Describe confidentiality in letter writing and mail processing. 10. Facilitate a computer module on medical correspondence. 11. Monitor students as they compose letters, proofread and edit samples.	*Goal: The student will demonstrate letter writing skills and how to handle correspondence in a professional manner.* A. Identify and practice letter styles. B. List and identify the parts of a letter. C. List and demonstrate the proper procedures for receiving and sorting incoming mail. D. Describe "annotation" and explain its use. E. Identify the equipment and supplies necessary for letter writing and processing mail. F. Describe medical transcription and its skills and methods; identify types of transcribed records and formats. G. Proofread and edit writing samples. H. Identify postage classes and postage rates. I. Maintain confidentiality in letter writing and mail processing. J. Perform a computer module on medical correspondence (completing a physical exam form, laboratory report, and completing form letters. K. Students will compose original letters and type letters in a variety of acceptable forms, proofreading and editing writing samples.	2.1 2.8 4.1 4.4 CR 1,2,4,5,7, 8,9, 11, and 12	C13.1 C13.2 C14.2	20	
9. Patient Management 1. Review scheduling and appointment systems. 2. Discuss appropriate methods of dealing with patient behaviors in the office.	*Goal: The student will understand a variety of organizational skills to maximize efficient office operation in providing patient services.* A. Design efficient scheduling and appointment systems. B. Identify appropriate methods of dealing with patient behaviors in the office.	2.2 2.4 2.8 4.1 4.4 4.6 5.1 5.4 5.6 CR 1,2,4,5,7,8 , and 12	C11.1- C11.5	20	

Instructional Content
Instruction will include:

Student Outcomes
At the end of instruction, the
student will be able to:

Hours
CL=Classroom
CC=Comm. Class.

Instructional Content	Student Outcomes	Anchor/CR	CTE	CL	CC
9. Patient Management (Continued) 3. Review telephone procedures and setting priorities. 4. Review telephone systems utilized in the office. 5. Describe/discuss telephone etiquette. 6. Discuss maintaining telephone logs and taking complete phone messages. 7. Review special scheduling/appt. systems. 8. Monitor completion of a registration form. 9. Monitor completion of a manual page from an appt book and cards. Review procedures/conditions that determine appropriate action. 10. Monitor completion of a computer module on appointments. 11. Describe the legal implications of the appointment book. 12. Discuss referral of telephone calls to medical assistance, physicians, or other health personnel.	C. Respond to typical telephone communications, determining priority of each incoming call. D. Describe telephone systems utilized in the office. E. Demonstrate telephone etiquette. F. Describe the need for maintaining telephone logs and taking complete phone messages. G. Identify special scheduling/appt. systems. H. Complete a registration form. I. Complete a manual page from an appointment book and cards; describe conditions that should be considered emergencies, require immediate appts. vs. someday appointments. J. Perform a computer module on appointments. K. Discuss the legal implications of the appointment book. L. Distinguish between calls that can be referred to a medical assistance or require referral to a physician or other health personnel.				
10. Financial Management 1. Describe data collection and processing coded insurance claims. 2. Review receipt and preparation of correspondence in order to verify insurance and bill patients. 3. Discuss how to access various insurance providers. 4. Discuss/Demonstrate cpt-4 codes, drugs, and how to code a bill on the computer. 5. Monitor student progress on use of computer to bill and complete a Hic form. 6. Review the difference between group, individual and HMOSs insurance. 7. Review types of medical practice organizations. 8. Review laws regulating credit and collections. 9. Describe the billing cycle and discuss collection methods and bookkeeping systems.	**Goal: The student will understand the purpose and function of a variety of medical and financial records system.** A. Collect data and practice processing coded insurance claims. B. Receive and prepare correspondence in order to verify insurance and bill patients. C. Access various insurance providers including Medical/Medical. D. Define cpt-4 codes, drugs, and code a bill on the computer. E. Practice billing, coding on a computer module and complete a Hic form. F. Identify the difference between group and individual insurance and HMOs. G. Identify types of medical practice organizations. H. Discuss law regulating credit and collections. I. Describe the billing cycle and discuss collection methods and bookkeeping systems.	7.1-7.4 2.1 2.6 2.8 5.2-5.6 CR 7,1,4,5,6, 8,9,11, 12 and 2	C14.2 C15.1- C15.7	40	

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Instructional Content	Student Outcomes			Hours	
Instruction will include:	At the end of instruction, the student will be able to:			CL=Classroom CC=Comm. Class.	

Instructional Content	Student Outcomes	Anchor/ CR	CTE	CL	CC
11. Office Maintenance and Management 1. Discuss both positive and negative factors that can contribute to the office environment. 2. Review the importance of an office procedures manual. 3. Discuss supply inventory and ordering systems. 4. Monitor completion of a purchase order, practice in ordering supplies on the computer. 5. Demonstrate how to view and access information from a computer vendor list and purchasing records.	**Goal: The student will demonstrate proper care of the physical environment and maintenance of office equipment supplies.** A. Identify factors in an office environment that can detract or make the facility a pleasant environment. B. Discuss the importance of an office procedure manual. C. Discuss the supply inventory and ordering systems are essential. D. May complete a purchase order on the computer, and practice ordering supplies, printing out and displaying purchase orders. E. View and access information from a computer vendor list and purchasing records. F.	4.1 7.6 11.1 11.4 10.1-10.3 10.5 CR 1,2,4,9, 8 and 12	C6.1 C6.2 C6.4 C6.7	20	
12. Admitting Procedures 1. Review admission terms. 2. Monitor completion of admission forms. 3. Describe daily duties and main function of an admitting/admissions clerk.	**Goal: The student will demonstrate in-patient and out-patient admitting procedures as related to the patient diagnosis.** A. Identify and list admission terms. B. Prepare sample admission forms. C. List and discuss daily duties of the admitting clerk. D. List and discuss characteristics of an excellent admitting clerk. E. Identify the main function of an admitting clerk. F. Describe the duties of an admission clerk.	2.0 CR 1,2,7, and 12	C9.1-C9.5 C8.1-C8.4	20	
13. Health Unit Management 1. Review health unit terms. 2. Discuss the role of the computer on a health unit. 3. Monitor stu dents progress when responding to call lights and using the computer to record. 4. Monitor students maintaining of patient records and treatment order forms. 5. Discuss the role of a health unit clerk.	**Goal: The students will understand the function of the health unit clerk** A. Identify health unit terms. B. Identify the role of the computer on the health unit. C. Answer call lights and record on the computer. D. Assist in maintaining patient record and treatment order forms. E. Describe the role of a health unit clerk.	4.3 4.4 7.2 CR 1,4,2,7, 8 and 12	C9.1-C9.5 C8.1-C8.4	20	
14. Career Planning and Job Seeking Skills. 1. Assist students in recognizing personal strengths, values and preparing a resume. 2. Monitor student development of a career portfolio with work samples. 3. Review completion of a job application and identification of potential employers. 4. Role play interviewing techniques in the classroom.	**Goal: The students will demonstrate competency in lifelong career planning skills, develop leadership abilities and develop an awareness of programs offered in higher education.** A. Identify personal strengths, values and prepare a pocket resume. B. Develop a career portfolio with work samples. C. Create a resume. D. Complete job applications and identify potential employers. E. Practice interview skills.	Anchor/ CR 3.8 3.9 3.1-3.6 4.1 5.4 11.5 CR 3,4,2, and 7	CTE	CL 30	CC

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