



Figure 1: Owens Logo.

Course Syllabus
_____ SEMESTER XXXX _____
School of Nursing and Health Professions

Course Name:	Administrative Procedures
Course & Section Number:	MAP 120
Meeting Day(s) & Time(s):	
Credits:	3 Credit Hours
Contact Hours:	3 Lecture Hours
Text:	Medical Assisting Administrative and Clinical Procedures With Anatomy and Physiology
Instructor's Name:*	
Office Hours & Location:	
OCC Phone:	
OCC Email:**	
Additional Contact Information:	

*Please call me (name); it is my preferred name. If you have a preferred name, please let me know so I can use it. (Optional)

**Please use only Owens email for course communications.

Catalog description:

Provides an introduction to the administrative duties in an allied health care facility. The student will learn communication etiquette, scheduling of appointments, filing systems and banking terminology.

Corequisites:

MAP 120

Course Materials:

Kathryn A. Booth, RN-BSN, RMA (AMY), RPT, ERF, CPht, MS, Leesa G. Whicker, BA, CMA (AAMA), Terri D. Wyman, CPC, CMCS, CMRS, AS -*Medical Assisting Administrative and Clinical Procedures With Anatomy and Physiology, 8th Edition*. McGraw Hill Publishing Company.

Kathryn A. Booth, RN-BSN, RMA (AMY), RPT, ERF, CPht, MS, Leesa G. Whicker, BA, CMA (AAMA), Terri D. Wyman, CPC, CMCS, CMRS, AS – Student Workbook for use with *Medical Assisting Administrative and Clinical Procedures With Anatomy and Physiology, 8th Edition*. McGraw Hill Publishing Company.

If a print book, e-book, or access code is required for class, you can access the Owens Community College e-Campus Bookstore by accessing the online link, called “Find Books” on the course schedule for each course section. See the example below.

OER and Owens Community College Library Resources (Open Educational Resources are free online materials for instructor and student use. Some OER material may be available in print in the Owens Community College Library.)

Inclusive Access (I.A.) Materials are included in the cost of the course to save students money through lower negotiated rates with publishers. Courses containing I.A. materials will have it noted on the online class schedule. If your course includes I.A. digital materials, you will receive an email with subject line, “Your inclusive Access Materials,” and it will include any codes or digital links.

The email will come to your Owens Community College email from the Owens e-Campus Bookstore on the first day of class, if not before. Be sure to check your spam (junk email) if you do not find it in your inbox. If the email is not in your inbox or spam folder, contact your instructor immediately. You may also see a folder at the top of your course labelled “Course Materials by eCampus.” This folder will contain any needed codes or links to needed materials.

If the I.A. materials also include a printed book or are in print form, the item will be shipped to your address of record automatically based on your enrollment in the course. Please note that some courses do not include printed materials in I.A. and those materials would need to be purchased separately using the link on the course schedule. When you access the Find Books link you will see which items in a course are included in I.A.

What You Will Learn in the Course

Course Objectives:

These areas of skill and knowledge will be expected by the student in order to successfully complete the course and will prepare the student for the Certified Medical Assistant examination offered through the American Association of Medical Assistants. The course will:

1. Explain verbal and nonverbal communication and how can be used effectively (SLO 1)
2. Identify the handling of office correspondence (SLO 2,3)
3. Discuss various types of appointment and management systems (SLO 3)
4. Explain how to properly maintain office equipment (SLO 5)
5. List the functions of a manual billing system (SLO 6,7,8)

6. Define the functions of accounts payable in the medical office (SLO 8)
7. Explain how to reconcile a monthly bank statement (SLO 8)

Student Learning Outcomes:

Students will:

Outcome	Where Assessed (List assignments, exams, discussions; items must be graded.)	
1. Identify nonverbal and verbal communication styles.	10-1 10-3 14-2 14-5 14-6	Create a Professional Letter Compose a Professional Email Answer the Telephone in Professional Manner Take a Telephone Message Participating in a Telehealth Interaction
2. Compose professional business letters	10-1 10-3	Create a Professional Letter Compose a Professional Email
3. Manage appointment scheduling and using established priorities	16-1 16-2 16-5	Create an Appointment Matrix Scheduling Appointments Schedule an Outpatient Surgical Procedure
4. Identify types of records common to the healthcare setting and information contained within the EMR		
5. Explain the importance of routine maintenance of office equipment	14-1	Perform an Office Inventory
6. Prepare a patient's ledger using proper bookkeeping terminology and abbreviations	14-1	Perform an Office Inventory
7. Prepare a Daysheet of patient services, charges, payments, and adjustments	20-1	Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance
8. Prepare a bank reconciliation, with information gathered from AR and AP	20-1	Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance
9. Demonstrate professional telephone and telehealth communication	14-2 14-5 14-6	Answer the Telephone in Professional Manner Take a Telephone Message Participating in a Telehealth Interaction
10. Compile a list of community resources to facilitate referrals	4-1 A 4-1 B	Identify Community Resources Prepare a Patient's Referral to a Community Resource

Program Outcomes:

The following program outcomes are assessed in this course

Outcome	Where Assessed (List assignments, exams, discussions; items must be graded.)	
Recognize the role of patient advocacy in the practice of medical assisting.	4-1 A 4-1 B	Identify Community Resources Prepare a Patient's Referral to a Community Resource
Demonstrate empathy in communicating with a culturally diverse population.	4-1 A 4-1 B	Identify Community Resources Prepare a Patient's Referral to a Community Resource
Incorporate communication skills when collaborating with patients, family members, and other healthcare professionals.	10-1 10-3 14-2	Create a Professional Letter Compose a Professional Email Answer the Telephone in Professional Manner
Comply with federal and state regulations as they apply to the field of medical assisting.		
Execute clinical and administrative skills as they relate to the profession of medical assisting	4-1 A 4-1 B 8-1 10-1 10-3 14-2 14-5 14-6 16-1 16-2 16-5 14-1 20-1 20-2	Identify Community Resources Prepare a Patient's Referral to a Community Resource Perform an Inventory of Supplies Create a Professional Letter Compose a Professional Email Answer the Telephone in Professional Manner Take a Telephone Message Participating in a Telehealth Interaction Create an Appointment Matrix Scheduling Appointments Schedule an Outpatient Surgical Procedure Perform an Office Inventory Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance Explain Professional Fees to a Patient

Institutional General Education Competencies:

As a student at Owens Community College, you will take General Education courses as part of your degree program. While specific to the General Education courses, will be reinforced in many of your degree program major courses and may be measured in your capstone course(s) and others as identified.

Competency	Where Assessed (List assignments, exams, discussions; items must be graded.)
Communicate effectively.	4-1 A Identify Community Resources 4-1 B Prepare a Patient's Referral to a Community Resource 8-1 Perform an Inventory of Supplies 10-1 Create a Professional Letter 10-3 Compose a Professional Email 14-2 Answer the Telephone in Professional Manner 14-5 Take a Telephone Message 14-6 Participating in a Telehealth Interaction 16-1 Create an Appointment Matrix 16-2 Scheduling Appointments 16-5 Schedule an Outpatient Surgical Procedure 14-1 Perform an Office Inventory 20-1 Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance 20-2 Explain Professional Fees to a Patient
Act with professional responsibility.	4-1 A Identify Community Resources 4-1 B Prepare a Patient's Referral to a Community Resource 8-1 Perform an Inventory of Supplies 10-1 Create a Professional Letter 10-3 Compose a Professional Email 14-2 Answer the Telephone in Professional Manner 14-5 Take a Telephone Message 14-6 Participating in a Telehealth Interaction 16-1 Create an Appointment Matrix 16-2 Scheduling Appointments 16-5 Schedule an Outpatient Surgical Procedure 14-1 Perform an Office Inventory 20-1 Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance 20-2 Explain Professional Fees to a Patient
Demonstrate sensitivity to others' beliefs and values.	4-1 A Identify Community Resources 4-1 B Prepare a Patient's Referral to a Community Resource
Think analytically, critically, and creatively.	16-1 Create an Appointment Matrix 20-1 Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance

Competency	Where Assessed (List assignments, exams, discussions; items must be graded.)

Technology, Lab, and File Requirements:

Laptop or Tablet. If one is not available to you, there are computers in HEC 136 available for student use during class.

McGraw Hill Connect: Access code included in textbook bundle and link to course is found in the course Blackboard shell.

Academic Support

Disability Services Resource Center: If you have a disability or acquire one, you may be entitled to receive reasonable accommodations intended to assure you an equal opportunity to participate in and benefit from the program. To receive more information or to register for accommodations, please contact the Disability Resource Center at 567-661-7007, email disability@owens.edu, visit <https://www.owens.edu/disability/>, or stop by College Hall 124.

Tutoring Services: Owens Community College offers academic tutoring and assistance in a variety of subjects including: accounting, computing, economics, mathematics, science, and writing. For more information go to: <https://www.owens.edu/successcenters/>.

Counseling Services: Counseling Services provides assistance to students experiencing personal, educational, interpersonal/relationship, family, social, or psychological difficulties. If you feel you may benefit from this service, please contact them at counselingservices@owens.edu. More information is at <https://www.owens.edu/counseling/>.

Campus and Community Connections: The Center for Campus and Community Connections (College Hall 123) is a walk-in office created to provide retention support through resource stability initiatives and community connections. Go here for more information: <https://www.owens.edu/connection/> or contact connections@owens.edu

Owens Library: The Owens Library offers two locations (Toledo and Findlay) as well as online resources. For more information visit <https://www.owens.edu/library/>.

Students can find more information on campus resources, student support, student life, and security at this [link](#).

General Information

Student Code of Conduct: All students are expected to follow Owens Community College's [Student Code of Conduct](#), which includes academic honesty, encompassing plagiarism. See the [Board Policy](#) for more information.

Anti-Discrimination and Harassment & Title IX/Sexual Misconduct: All students, faculty, and staff are expected to follow Owens Community College's [Anti-Discrimination and](#)

Harassment Policy and the College's Title IX Policy/Sexual Misconduct Procedures and Guidelines. The College strictly prohibits and will not tolerate harassment, discrimination, intimidation, or hostile/offensive working or learning environments.

Religious Accommodations: A student seeking an accommodation for an absence permitted under Ohio's Testing Your Faith Act must provide the instructor with a written email notice with the specific dates for an absence, and must do so not later than fourteen (14) days after the first day of instruction. Alternative accommodations are not retroactive, and no academic penalty will be imposed for an absence under the policy*. The request for an alternative accommodation will be kept confidential. Students with questions about a religious accommodation under Ohio's Testing your Faith Act may contact the College's Office of Academic Affairs: provost@owens.edu. The policy may be found on the Owens website: [3358:11-2-63 Accommodation for a Student Absence for the Observance of Religious Beliefs and Practices Policy](#)

Document Collection: Throughout the semester, your instructors may ask for a variety of assignments including tests and/or quizzes for student learning of institutional general education competencies or program assessment. Please save all your class materials until the end of the semester.

Classroom Admittance: OCC classes shall only be attended by the officially registered OCC students or perspective students, instructor of record, guest lecturer, or substitute. Visitors are not permitted to be in the classroom and should not be invited to attend or participate in the class. See [FERPA](#) regulations for more information.

Use of AI Tools: This course permits you to use artificial intelligence (AI) tools, such as chatbots, text generators, paraphrasers, summarizers, or solvers, to get guidance on assignments, as long as you do so in an ethical and responsible manner. Essentially, you can think of these tools as ways to help you learn but not to entirely create work for assignments like discussion board posts, essays, presentation slides, and so on. AI is more like your tutor or TA, not a replacement for your independent thinking.

This means that you must:

- Not use AI tools to replace your own thinking or analysis or to avoid engaging with the course content.
- Cite or explain any AI tools you use. Provide the name of the AI tool, the date of access, the URL of the interface, and the specific prompt or query you used to generate the output.
- Be transparent and honest about how you used the AI tool and how it contributed to your assignment. Explain what you learned from the AI tool, how you verified its accuracy and reliability, how you integrated its output with your own work, and how you acknowledged its limitations and biases.

You are accountable for any mistakes or errors made by the AI tool. Always check and edit the output before submitting your work. If you discover any inaccuracies or inconsistencies in the output after submission, notify the instructor immediately and correct them as soon as possible. Using AI tools in an unethical or irresponsible manner, such as copying or paraphrasing the output without citation or transparency, using the output as your own work without verification

or integration, or using the output to misrepresent your knowledge or skills, is considered a form of academic dishonesty and will result in a zero grade for the assignment and possible disciplinary action. If you have any questions about what constitutes ethical and responsible use of AI tools, please consult with the instructor **before** submitting your work.

If you have any questions about what constitutes ethical and responsible use of AI tools, please consult with the instructor before submitting your work.

Student Responsibilities & Instructor Expectations

1. To discuss immediately with the instructor any questions regarding class procedure, assignments or grades.
2. To attend class regularly. It is a requirement that you attend 85% of the class whether it is an excused or unexcused absence. A student who does not attend regularly may experience considerable difficulty. Regular attendance is essential in this class. If there is a need for you to be absent, it is your responsibility to learn of any announcements concerning assignments and/or lab assignments or changes from the syllabus, from a classmate.
3. No eating or drinking in the lab area of the classroom. All liquids must be in a closed container and must always remain in the lecture area of the room.
4. You are expected to follow all instructions given with respect to the care and operations of the equipment in the classroom.
5. Students are expected to be in proper uniform for class as described in the Medical Assistant Handbook. The instructor reserves the right to remove a student who is out of uniform in clinical classes (MAP 110, MAP 130, MAP 210, MAP 240). Students will be responsible for making up the lab time and skills missed.
6. All interactions within the classroom should reflect mutual respect, integrity, and a commitment to a positive learning environment. Faculty and students are expected to communicate courteously, maintain appropriate boundaries, and demonstrate professionalism in both words and actions. This includes being prepared, engaged, and respectful of differing perspectives. Professional conduct fosters trust, supports academic success, and ensures that the classroom remains a safe and inclusive space for all.

Instructor Expectations:

INSTRUCTION METHODS

Lecture
Discussion
In-class activities
Role Playing

METHODS OF EVALUATIONS

Perform procedures required by CAAHEP
Pen and Pencil Examinations
Homework

Classroom Environment:

Our classroom is a professional learning space where every student is valued and supported. We recognize that individuals learn in different ways, and instruction will incorporate a variety of teaching methods—including hands-on practice, visual aids, discussions, and collaborative activities—to meet diverse learning styles. Students are encouraged to actively participate, ask questions, and share ideas in a respectful manner. By working together in a spirit of professionalism, empathy, and mutual respect, we can create a safe and inclusive environment that prepares each of us for success in the medical assisting profession.

POLICY ON MAKE-UP EXAMINATIONS: You will be given an opportunity to make up examinations missed for an approved excused absence with no penalty. You are only allowed to make up one chapter test for an unexcused absence. Examinations need to be completed within seven (7) days of the missed class at a day and time scheduled by your instructor. Failure to complete the make-up examination on the day and time scheduled by the instructor will result in a score of zero.

CELLULAR PHONES: Unless authorized by the instructor, there will be no use of cell phones. This includes texting, using apps, etc. during class time. Failure to have your cell phone on vibrate will lead to further disciplinary action. When you are working in the lab portion of the classroom, you are not allowed to have your cell phone on your person. If you need to be contacted immediately due to an emergency, family members can contact the School of Nursing and Healthcare Professions office at 567-661-7295 or the Department of Public Safety at 567-661-7575 and a message will be passed to you.

ESSENTIAL FUNCTIONS/TECHNICAL STANDARDS: The essential functions are the basic activities that you must be able to perform to complete the Medical Assisting curriculum.

1. Attend scheduled classes, labs, and supervised practices; be present for examination and testing.
2. Assimilate information presented via lecture, handouts, videos, discussions, computer and/or other educational modalities.
3. Complete assignments such as written assignments, oral presentations, class participation, examinations and computer-based activities.
4. Apply the assimilated information to appropriate clinical situations.
5. Effectively communicate with faculty, fellow students and professionals, using oral, written and computer modalities in an appropriate and professional manner.
6. Make effective use of learning resources at Owens Community College.
7. Demonstrate sufficient critical thinking skills to assess multifactorial aspects of medical assisting practices.
8. Organize and prioritize necessary tasks/activities within time constraints.

Demonstrate sufficient computer skills, eye and hand coordination to perform certain aspects of medical assisting practices

How Grades are Determined and Major Assignments

Evaluation Measure The grade points for the areas of work are as follows.		Student Learning Outcomes Assessed	Value
4-1 A	Identify Community Resources	10	30% weighted
4-1 B	Prepare a Patient's Referral to a Community Resource	10	30% weighted
8-1	Perform an Inventory of Supplies	5	30% weighted
10-1	Create a Professional Letter	1,2	30% weighted
10-3	Compose a Professional Email	1,2	30% weighted
14-2	Answer the Telephone in Professional Manner	9	30% weighted
14-5	Take a Telephone Message	9	30% weighted
14-6	Participating in a Telehealth Interaction	9	30% weighted
16-1	Create an Appointment Matrix	3,4	30% weighted
16-2	Scheduling Appointments	3	30% weighted
16-5	Schedule an Outpatient Surgical Procedure	3	30% weighted
14-1	Perform an Office Inventory	5	30% weighted
20-1	Post Entry on a Day Sheet and Prepare an Accounts Receivable Trial Balance		30% weighted
20-2	Explain Professional Fees to a Patient		30% weighted

*Evaluations must be passed with an 85% or higher. Students will have two opportunities to pass an evaluation.

The final course grade is to be computed using the following weights.

Evaluation Measure	Value	Student Learning Outcome Assessed
Assigned Homework	10%	1-10
Terminology/Spelling Quiz	10%	1-10
Procedure/Evaluations	30%	1-10
Chapter Tests	25%	1-10
Final Exam – Comprehensive	25%	1-10

Grading Scale

Grade	Points
A	93 – 100%
B	86 – 92.99%
C	76 – 85.99%
D	70 – 75.99%
F	0 – 69.99%

Grading Procedure:

Grades will be calculated on the following scale.

93% and Above	A
86% to 92.99%	B
76% to 85.99%	C
70% to 75.99%	D
Less Than 69.99%	F

Tentative Class Assignments:

Week	SLO	Day/Date	Readings	Activity/Assignment	Assessment
1			Chapter 4: Interpersonal Communication	Begin Ch. 4 Discussion HW: Workbook pgs. 24-30 (Matching, T/F, MC, Sentence Completion, SA)	
				Ch. 4 Discussion HW check-in	Eval: 4-1, 4-1a, 4-1b, 4-2
2					
				HW DUE Ch 4 Finish Ch. 4 Discussion Review for Ch. 4 Test/Spelling	
3			Chapter 8: Office Equipment and Supplies	Begin Ch. 8 Discussion HW: Workbook pgs. 85-90 (Matching, T/F, MC, Sentence Completion, SA)	Chapter 4 Test Ch. 4 Spelling/Terms Quiz Eval 4-1, 4-1a, 4-1b, 4-2 Due
				Finish Ch. 8 Discussion HW check-in (answer questions) Review for Ch. 8 Test/Spelling	
4			Chapter 10: Written and Electronic Communication	Begin Ch. 10 Discussion HW Due: Ch 8 HW: Workbook Pgs. 113-120 (All Sections)	Chapter 8 Test Ch. 8 Spelling/Terms Quiz
				Continue Ch. 10 Discussion HW Check-in (answer questions) Work on Evaluations	Eval 10-1, 10-3, 11-3
5			Ch 11: Medical Record	HW DUE Ch10 Finish Ch. 10 Discussion Work on Evaluations Review for Ch. 10 Test/Spelling	
				Begin Ch. 11 HW: Workbook pgs: 133-138	Chapter 10 Test Eval 10-1, 10-3, 11-3 DUE
6				HW DUE Ch. 11 Continue Ch. 11 Discussion	
				Finish Ch. 11 Discussion Review for Ch. 11 Test/Spelling Quiz	
7			Chapter 12: Electronic Health Records	Begin Ch. 12 Discussion HW: Workbook pgs. 149-152 (All sections)	Ch 11 Test Ch. 11 Spelling/Terms Quiz Eval 12-1, 12-3, 12-4 in Connect online In class
				Continue Ch. 12 Discussion HW Check in	

8				HW DUE Ch 12 Connect Procedures in class Finish Ch. 12 Discussion Review for Ch. 12 Test	Eval 12-1, 12-3, 12-4 in Connect online DUE
			Chapter 13: Managing Medical Records	Begin Ch. 13 Discussion HW: Workbook Pgs. 163-168 (All sections)	Chapter 12 Test Ch. 12 Spelling/Terms Quiz
9				Continue Ch. 13 Discussion HW Ch 13	
			Chapter 14: Telephone Techniques	Finish Ch. 13 Discussion Review for Ch. 13 Test/Spelling Quiz	
10				Begin Ch. 14 Discussion HW: Workbook Pgs. 177-181 (Matching – Short Answer)	Chapter 13 Test Ch. 13 Spelling/Terms Quiz Eval 14-2, 14-5, 14-6
				Finish Ch. 14 Discussion Practice Evaluations Review for Ch. 14 Test	
11			Chapter 16: Schedule Management	Begin Ch. 16 Discussion Hand out Ch. 16 Evaluations (16-1,2,5) HW: Workbook Pgs. 213-219 (all sections)	Chapter 14 Test Ch. 14 Spelling/Terms Quiz Eval 14-2, 14-5, 14-6 DUE
				Continue Ch. 16 Discussion HW Check-In (answer questions)	Eval 16-1, 16-5, 16-6
12				HW DUE Continue Ch. 16 Discussion Work on Evaluations in class	Eval 16-1, 16-5, 16-6
				Finish Ch. 16 Discussion Work on Evaluations in class Review for Ch. 16 Test/Spelling Quiz	Eval 16-1, 16-5, 16-6
13			Chapter 20: Patient Collection and Financial Management	Begin Chapter 20 Hand out Evals HW: Workbook Pgs. 295-301 (all sections)	Chapter 16 Test Ch. 16 Spelling/Terms Quiz Eval 16-1, 16-5, 16-6 DUE
				HW DUE Continue Ch. 20 Discussion Work on Evaluations in class Vocab Quiz Review Ch 20 Key Terms	Eval 20-1, 20-3 Eval 20-1, 20-3 DUE
14				Finish Ch. 20 Discussion Review For Ch. 20 Test/Spelling Quiz	Eval 20-4, 20-5 Eval 20-4, 20-5 DUE
		Wednesday, 11/26			

15		Monday, 12/1		Catch-up Day Finish Evaluations	Chapter 20 Test Ch. 20 Spelling/Terms Quiz
		Wednesday, 12/3		Eval: 8-4 Office/Lab Inventory Complete in Class	
16		Monday, 12/8		Final Exam Review	<i>All Evaluations MUST BE COMPLETED</i>
		Wednesday, 12/10		Final Exam	Final Exam

Disclaimer: The instructor reserves the right to amend this syllabus as deemed necessary and will communicate such amendment to the students in the course. Please note that while unlikely, there is a possibility courses might need to change the delivery method due to external issues like public health concerns, weather issues, etc. If this happens, the college will communicate any changes via email and/or other communication methods.

Reviewed 8/25
MAERB FOUNDATIONS FOR CLINICAL PRACTICE MAP 120

Cognitive (Knowledge Base)	Psychomotor (Skills)	Affective (Behavior)
V.C Concepts of Effective Communication 1. Identify types of verbal and nonverbal communication 2. Identify communication barriers 3. Identify techniques for overcoming communication barriers 4. Identify the steps in the sender-receiver process 5. Identify challenges in communication with different age groups 6. Identify techniques for coaching a patient related to specific needs 7. Identify different types of electronic technology used in professional communication 8. Identify the following related to body systems*: a. medical terms b. abbreviations 9. Identify the principles of self-boundaries 10. Identify the role of the medical assistant as a patient navigator 11. Identify coping mechanisms 12. Identify subjective and objective information 13. Identify the basic concepts of the following theories of: a. Maslow b. Erikson c. Kubler-Ross 14. Identify issues associated with diversity as it relates to patient care 15. Identify the medical assistant's role in telehealth *Body systems must include, but are not limited to, the following: Circulatory, Digestive, Endocrine, Integumentary, Lymphatic, Muscular, Nervous, Sensory, Reproductive, Respiratory, Skeletal, and Urinary VI.C Administrative Functions	V.P. Concepts of Effective Communication 1. Respond to nonverbal communication 2. Correctly use and pronounce medical terminology in health care interactions 3. Coach patients regarding: a. office policies b. medical encounters 4. Demonstrate professional telephone techniques 5. Document telephone messages accurately 6. Using technology, compose clear and correct correspondence 7. Use a list of community resources to facilitate referrals 8. Participate in a telehealth interaction with a patient VI.P Administrative Functions 1. Manage appointment schedule using established priorities 2. Schedule a patient procedure 3. Input patient data using an electronic system 4. Perform an inventory of supplies VII.P Basic Practice Finances 1. Perform accounts receivable procedures to patient accounts including posting: a. charges b. payments c. adjustments 2. Input accurate billing information in an electronic system 3. Inform a patient of financial obligations for services rendered	A.1 Demonstrate critical thinking skills A.2 Reassure patients A.3 Demonstrate empathy for patients' concerns A.4 Demonstrate active listening A.5 Respect diversity A.6 Recognize personal boundaries A.7 Demonstrate tactfulness A.8 Demonstrate self-awareness

1. Identify different types of appointment scheduling methods 2. Identify critical information required for scheduling patient procedures 3. Recognize the purpose for routine maintenance of equipment 4. Identify steps involved in completing an inventory 5. Identify the importance of data back-up 6. Identify the components of an Electronic Medical Record, Electronic Health Record, and Practice Management system VII.C Basic Practice Finances 1. Define the following bookkeeping terms: a. charges b. payments c. accounts receivable d. accounts payable e. adjustments f. end of day reconciliation 2. Identify precautions for accepting the following types of payments: a. cash b. check c. credit card d. debit card 3. Identify types of adjustments made to patient accounts including: a. non-sufficient funds (NSF) check b. collection agency transaction c. credit balance d. third party 4. Identify patient financial obligations for services rendered		
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