

# Medical Business Practices Content Areas VI-IX

## CONTENT AREA VI: Administrative Functions

### Cognitive (Knowledge) VI.C Administrative Functions

### Psychomotor (Skills) VI.P Psychomotor Functions

### Affective (Behavior) VI.A Administrative Functions

1. Identify different types of appointment scheduling methods
2. Identify advantages and disadvantages of the following appointment systems
  - a. manual
  - b. electronic
3. Identify critical information required for scheduling patient procedures
4. Define types of information contained in the patient's medical record
5. Identify methods of organizing the patient's medical record based on:
  - a. problem-oriented medical record (POMR)
  - b. source-oriented medical record (SOMR)
6. Identify equipment and supplies needed for medical records in order to:
  - a. create
  - b. maintain
  - c. store
7. Describe filing indexing rules
8. Differentiate between electronic medical records (EMR) and a practice management system
9. Explain the purpose of routine maintenance of administrative and clinical equipment
10. List steps involved in completing an inventory
11. Explain the importance of data back-up
12. Explain meaningful use as it applies to EMR

1. Manage appointment schedule using established priorities
2. Schedule a patient procedure
3. Create a patient's medical record
4. Organize a patient's medical record
5. File patient medical records
6. Utilize an EMR
7. Input patient data utilizing a practice management system
8. Perform routine maintenance of administrative or clinical equipment
9. Perform an inventory with documentation

1. Display sensitivity when managing appointments

## CONTENT AREA VII: Basic Practice Finances

### Cognitive (Knowledge) VII.C Basic Practice Finances

### Psychomotor (Skills) VII.P Basic Practice Finances

### Affective (Behavior) VII.A Basic Practice Finances

1. Define the following bookkeeping terms:
  - a. charges
  - b. payments
  - c. accounts receivable
  - d. accounts payable
  - e. adjustments
2. Describe banking procedures as related to the ambulatory care setting
3. Identify precautions for accepting the following types of payments:
  - a. cash
  - b. check
  - c. credit card
  - d. debit card
4. Describe types of adjustments made to patient accounts including:
  - a. non-sufficient funds (NSF) check
  - b. collection agency transaction
  - c. credit balance
  - d. third party
5. Identify types of information contained in the patient's billing record
6. Explain patient financial obligations for services rendered

1. Perform accounts receivable procedures to patient accounts including posting:
  - a. charges
  - b. payments
  - c. adjustments
2. Prepare a bank deposit
3. Obtain accurate patient billing information
4. Inform a patient of financial obligations for services rendered

1. Demonstrate professionalism when discussing patient's billing record
2. Display sensitivity when requesting payment for services rendered

## CONTENT AREA VIII: Third Party

### Reimbursement

### Cognitive (Knowledge) VIII.C Third Party Reimbursement

### Psychomotor (Skills) VIII.P Third Party Reimbursement

### Affective (Behavior) VIII.A Third Party Reimbursement

1. Identify:
  - a. types of third party plans
  - b. information required to file a third party claim
  - c. the steps for filing a third party claim
2. Outline managed care requirements for patient referral
3. Describe processes for:
  - a. verification of eligibility for services
  - b. precertification
  - c. preauthorization
4. Define a patient-centered medical home (PCMH)

1. Interpret information on an insurance card
2. Verify eligibility for services including documentation
3. Obtain precertification or preauthorization including documentation
4. Complete an insurance claim form

1. Interact professionally with third party representatives
2. Display tactful behavior when communicating with medical providers regarding third party requirements
3. Show sensitivity when communicating with patients regarding third party requirements

5. Differentiate between fraud and abuse

**CONTENT AREA IX: Procedural and Diagnostic Coding**

**Cognitive (Knowledge) IX.C Procedural and Diagnostic Coding**

1. Describe how to use the most current procedural coding system
2. Describe how to use the most current diagnostic coding classification system
3. Describe how to use the most current HCPCS level II coding system
4. Discuss the effects of:
  - a. upcoding
  - b. downcoding
5. Define medical necessity as it applies to procedural and diagnostic coding

**Psychomotor (Skills) IX.P Procedural and Diagnostic Coding**

1. Perform procedural coding
2. Perform diagnostic coding
3. Utilize medical necessity guidelines

**Affective (Behavior) IX.A Procedural and Diagnostic Coding**

1. Utilize tactful communication skills with medical providers to ensure accurate code selection