



# NHA Certified Medical Administrative Assistant 2015

## NHA/CMAA-2015

*This document provides the correlation between HealthCenter21 interactive e-learning curriculum, and the NHA Certified Medical Administrative Assistant 2015 standards.*



Engage.Learn.Succeed  
[www.aeseducation.com](http://www.aeseducation.com)

312 E Walnut Street  
Lancaster, PA 17602  
1-800-220-2175



# HealthCenter21 Template

*All NHA Certified Medical Administrative Assistant 2015 NHA/CMAA-2015*

## Appointments

Medical Appointment Role Play  
Introduction to Appointments  
Scheduling Systems  
Routine Appointments  
Referrals  
Managing Appointments  
Reflection Questions  
Handling Appointments  
Current Event

## Accounting

Money Exchange Game  
Introduction to Accounting  
Billing and Collections  
Bookkeeping  
Disbursements  
Banking  
Reflection Questions  
Accounting Department Scenario  
Current Event

## Insurance and Coding

The Importance of Health Insurance  
Insurance  
Government Programs  
Coding  
Claims  
Reflection Questions and Discussion  
Insurance and Coding Scenario  
Current Event

## Health Information

### Technology

HIT Terminology  
Health Information Technology Overview  
Electronic Health Records  
Health Insurance Portability and  
Accountability Act (HIPAA)  
Reflection Questions and Discussion  
Current Event

## Office Environment

Evacuation Plan  
Office Environment and Reception Area  
Responsibilities  
Managing the Office Facility  
Communication Exercise  
Reflection Questions  
Designing a Reception Area  
Current Event

## Telephone Etiquette

Identifying Callers  
Basic Telephone Communication  
Managing Incoming Calls  
Following Through  
Special Features and Services  
Reflection Questions  
Handling Calls Skit  
Current Event

## Written Communication

Written Communication Activity  
Processing Incoming Mail  
Written Communication  
Types of Written Communication  
Outgoing Mail  
Reflection Questions  
Creating Written Communication Activity  
Current Event

## Medical Records

Medical Records Word Search  
Medical Records  
Filing Equipment and Systems  
Alphabetical and Numerical Filing  
Medical Records Management  
Reflection Questions  
Medical Records Practice  
Current Event



# HealthCenter21 Template

*All NHA Certified Medical Administrative Assistant 2015 NHA/CMAA-2015*

## Safety Precautions

Greet, Identify & Explain a Procedure  
Safety Guidelines and Regulations  
Body Mechanics  
Environmental Safety  
Reflection Questions and Discussion  
Create an Evacuation Plan  
Safety Guidelines Poster  
Current Event

## EHR Simulation

Module Resources  
Scheduling Appointments  
Other Front Office Tasks  
Clinical Tasks  
EHR Simulation Sandbox

## Legal and Ethical Responsibilities

Confidentiality Role Play  
Civil and Criminal Law  
Privacy and Security  
Advance Directives and Client Rights  
Liability and Ethics  
Workplace Law  
Reflection Questions and Discussion  
Advance Directives (Create a Living Will)  
Ethics Debate  
Code of Ethics  
Scope of Practice  
Current Event

## Computing Systems

Computing Systems Matching Game  
Computers, Information Processing and Storage  
Operating Systems and Networks  
Web Browsers, Email and Safe Computing  
Home Computing  
Reflection Questions and Discussion  
Resolve Computing Systems Issues  
Additional Network Investigation  
Current Event

## Digital Citizenship

Digital Citizenship Choices  
Digital Literacy  
Digital Communication  
Online Safety  
Reflection Questions and Discussion  
Resolving Issues  
Ethical Issues with Electronic Communications  
Ethical Issues with Intellectual Property Rights  
Current Event

## Communications

Communications Game  
Basic Communication  
Interpersonal Communication  
Communication Barriers  
Communicating with Patients  
Documentation  
Communication Technology  
Reflection Questions and Discussion  
Communication Skits  
Culture/Religion Presentation  
Taking Phone Messages  
Communication Diversity Skit  
Current Event

## Medical Office Assistant

Communication Game  
Introduction to Medical Office Assisting  
Professional Traits  
Legal Responsibilities  
Communication Exercise  
Reflection Questions  
Personal/Professional Qualities Skit  
Current Event



# HealthCenter21 Template

*All NHA Certified Medical Administrative Assistant 2015 NHA/CMAA-2015*

## Office Equipment

Office Equipment Guessing Game  
Computers  
Other Equipment  
Maintenance and Troubleshooting  
Office Supplies  
Reflection Questions  
Inventory and Purchasing Activity  
Current Event

## Medical Terminology

Word Search Puzzle  
Word Parts: Roots  
Word Parts: Suffixes and Prefixes  
Abbreviations  
Anatomic References  
Reflection Questions and Discussion  
Worksheet & Crossword Puzzle  
Current Event

## Word 2: Fundamentals

Formatting Lists, Paragraphs, and Documents  
Working with Tables  
Completing a Report Using MLA  
Who's Who - Who is This Person

## Excel 2: Fundamentals

Using Formulas and Functions  
Data Management and Analysis  
Formatting in Excel  
Who's Who - Age is Only a Number  
Using an Excel Template

## Web Research

Reliable Sources on the Internet  
Seek It  
Find It  
Evaluate It  
Reflection Questions and Discussion  
Resolve Web Related Issues  
Additional Browser Investigation  
Current Event

## Getting Started with Microsoft Office

Introduction  
Common Office Features

<b>1.</b>	<b>Scheduling</b>	
<b>A.</b>	<b>Evaluate different types of patient scheduling</b>	<b>9 / 9</b>
1	Identify the patient (e.g., the same last name, same first AND last name, same date of birth).	Appointments
2	Interpret the purpose of the visit.	Appointments
3	Arrange the procedures in the scheduling book.	Appointments
4	Knowledge of wave booking	Appointments
5	Knowledge of double-booking	Appointments
6	Knowledge of modified wave	Appointments
7	Knowledge of stream/time-specific	Appointments
8	Knowledge of open booking	Appointments
9	Knowledge of cluster or categorization booking	Appointments
<b>B.</b>	<b>Determine scheduling needs of the facility, as well as new and established patients</b>	<b>9 / 9</b>
1	Knowledge of how to input new patient information	Appointments
2	Identify type of service needed by the patient.	Appointments
3	Knowledge of availability on the provider's schedule (e.g., physician and nurse)	Appointments
4	Obtain referrals.	Appointments
5	Knowledge of appointment intervals	Appointments
6	Knowledge of physicians' preferences, needs, and schedule matrix	Appointments
7	Knowledge of block scheduling	Appointments
8	Knowledge of nurses' preferences, needs, and schedule	Appointments
9	Identify dates and times when the schedule needs to be blocked out for the facility.	Appointments
<b>C.</b>	<b>Follow protocol for no-show, missed, cancelled, or follow-up appointments</b>	<b>7 / 7</b>
1	Knowledge of fees	Accounting
2	Knowledge of follow-up procedures for no-show, missed, and cancelled appointments	Appointments
3	Knowledge of office policies related to charges for missed appointments	Appointments

4	Check with physician to determine if a patient can be seen.	Appointments
5	Reschedule for later appointments.	Appointments
6	Knowledge of how to document a no-show, missed, or cancelled appointment	Appointments
7	Send out notifications for no-show and missed appointments.	Appointments
<b>D.</b>	<b>Arrange for diagnostic testing and procedures</b>	<b>10 / 11</b>
1	Call for pre-authorization for testing and procedures.	Appointments
2	Check for referrals prior to appointment.	Appointments
3	Knowledge of participating or non-participating facilities to arrange for diagnostic testing and procedures	Insurance & Coding
4	Verify patient billing address for scheduling needs.	Appointments
5	Verify best method of contact for scheduling appointments.	Appointments
6	Provide patient with instructions for pre-testing or diagnostic procedures.	Appointments
7	Schedule pre-admission testing.	Appointments
8	Ensure patient has the correct address of the facility.	Appointments
9	Ensure patient has the correct name of the referred physician.	Appointments
10	Document information in patient chart.	Appointments
11	Follow-up with patient to ensure compliance with physician's instructions.	
<b>E.</b>	<b>Confirm future appointments</b>	<b>6 / 6</b>
1	Follow HIPAA guidelines (e.g., what should or should not be disclosed when scheduling and confirming future appointments).	Health Information Technology Office Environment
2	Instruct patient to bring insurance and identification to the appointment.	Appointments
3	Verify patient's insurance is participating with physician's office.	Insurance & Coding
4	Knowledge of how to document a no-show, missed, or cancelled appointment	Appointments
5	Check for referrals prior to appointment.	Appointments
6	Inform patient of co-pay requirement.	Appointments
<b>2.</b>	<b>Patient Intake</b>	
<b>A.</b>	<b>Confirm demographic information with patient</b>	<b>4 / 6</b>
1	Maintain appropriate demographic data (e.g., address, phone number, date of birth, insurance information).	Appointments

2	Check that the patient's Protected Health Information (PHI) has been entered.	Appointments
3	Confirm the patient's advanced directives.	
4	Knowledge of special needs in regards to special paperwork (e.g., visually impaired patients, language barrier patients)	
5	Ensure demographic form is signed.	Office Environment
6	Knowledge of best method of contact for confirming demographic information	Office Environment
<b>B.</b>	<b>Verify insurance information</b>	<b>11 / 13</b>
1	Verify coverage benefits.	Appointments
2	Verify co-pay.	Appointments Office Environment
3	Review insurance card.	Appointments Insurance & Coding
4	Review form of photo identification.	Insurance & Coding
5	Verify changes in coverage.	Office Environment
6	Verify whether patient has secondary and/or tertiary coverage.	Office Environment
7	Knowledge of the Birthday Rule	Insurance & Coding
8	Verify policyholder.	Appointments
9	Determine which laboratory is the appropriate facility for a patient to use.	
10	Determine benefit information.	
11	Identify the difference between the guarantor and the patient, if it exists.	Accounting
12	Knowledge of basic coding (e.g., ICD, CPT)	Insurance & Coding
13	Ability to communicate with insurance company	Insurance & Coding Telephone Etiquette Written Communication
<b>C.</b>	<b>Ensure forms are updated or completed</b>	<b>1 / 1</b>
1	Ensure forms are signed (e.g., assignment of benefits, advanced directives, living will, health history, consent to release information, records release, HIPAA release, financial responsibility, DNR, health care surrogate).	Appointments Office Environment
<b>D.</b>	<b>Prepare encounter form</b>	<b>4 / 4</b>
1	Knowledge of other practitioners and physicians for referrals	Appointments
2	Basic knowledge of procedures performed in the back office	Accounting
3	Verify information on encounter form.	Accounting

4	Recognize, but do not interpret, basic coding (e.g., ICD, CPT).	Insurance & Coding
<b>E. Prepare daily charts</b>		<b>5 / 6</b>
1	Retrieve and file the record.	Medical Records
2	Create medical record.	Medical Records
3	Knowledge of how to retrieve future appointment schedules	Appointments Health Information Technology
4	Ensure delivery to the proper physician.	
5	Match the correct patient to the correct chart.	Safety Precautions
6	Update the patient's chart with progress notes.	Medical Records
<b>3. Office Logistics</b>		
<b>A. File medical records</b>		<b>3 / 5</b>
1	Knowledge of filing systems (e.g., electronic, alphabetical procedures, terminal digit procedures [such as primary, secondary, and tertiary])	Medical Records
2	Ability to cross-reference charts	Medical Records
3	Basic knowledge of scanning documents	
4	Basic knowledge of correlation of charts (e.g., labs categorized under laboratories, prescriptions categorized under Prescriptions)	
5	Basic knowledge of EHR/EMR (Electronic Health Records/Electronic Medical Records)	EHR Simulation Health Information Technology Medical Records
<b>B. Perform financial procedures</b>		<b>7 / 7</b>
1	Collect copayments.	Accounting
2	Create statements (e.g., office visit invoices, pre-invoices).	Accounting
3	Create receipt for payment.	Accounting
4	Knowledge of basic financial terminology (e.g., copay, deductibles, co-insurance, fee schedule)	Multiple Locations
5	Use of petty cash	Accounting
6	Basic knowledge of bookkeeping system (e.g., double or single entry)	Accounting
7	Complete day sheet	Accounting
<b>C. Evaluate mail deliveries</b>		<b>2 / 3</b>
1	Sort and distribute mail.	Written Communication



2	Knowledge of different classes of mail (e.g., registered, certified, first-class, priority, FedEx, USPS)	Written Communication
3	Verify contents of package against package slip.	
<b>4.</b>	<b>Compliance</b>	
<b>A.</b>	<b>Follow HIPAA guidelines</b>	<b>12 / 14</b>
1	Ensure patient's privacy and security of protected health information.	EHR Simulation Health Information Technology
2	Ensure charts are properly secured (e.g., displayed with personal information covered).	EHR Simulation Office Environment
3	Use a HIPAA-compliant sign-in sheet.	
4	Knowledge of what information is not private for authorities and health departments (e.g., child abuse, STDs/STIs, gunshot wounds, HIV)	Health Information Technology Legal & Ethical Responsibilities
5	Knowledge of record release forms	Legal & Ethical Responsibilities
6	Knowledge of who can access patient's chart	Health Information Technology
7	Proper use of passwords	Communications Computing Systems Digital Citizenship Medical Office Assistant
8	Knowledge of peer-to-peer information	
9	Follow HIPAA guidelines for covered and non-covered entities.	Legal & Ethical Responsibilities Medical Office Assistant
10	Knowledge of appropriate discussion of medical information (e.g., when and where)	Health Information Technology
11	Knowledge of proper verification of medical information (e.g., what to release and what not to release when verifying information)	Medical Records
12	Knowledge of penalties for violating HIPAA practices	Health Information Technology
13	Document release of information (e.g., when and to whom information can be released)	Medical Records
14	Knowledge of PHI standards	Health Information Technology
<b>B.</b>	<b>Follow OSHA guidelines</b>	<b>4 / 4</b>
1	Adhere to OSHA guidelines.	Safety Precautions
2	Knowledge of MSDS	Safety Precautions

3	Knowledge of how to report an OSHA incident	Legal & Ethical Responsibilities Safety Precautions
4	Knowledge of the evacuation plans and emergency procedures	Safety Precautions
<b>C.</b>	<b>Follow the Center for Medicare/Medicaid Services (CMS) guidelines</b>	<b>4 / 5</b>
1	Report Medicare/Medicaid fraud	Insurance & Coding Legal & Ethical Responsibilities
2	Awareness of consequences of fraud	Legal & Ethical Responsibilities
3	Knowledge of the difference between Medicare and Medicaid	Insurance & Coding
4	Recognize the CMS-1500 form	Insurance & Coding
5	Recognize the UB04	
<b>5.</b>	<b>Patient Education</b>	
<b>A.</b>	<b>Explain the Patients' Bill of Rights</b>	<b>6 / 8</b>
1	Explain to patient that medical decisions are made by physicians.	Legal & Ethical Responsibilities
2	Explain to patient that he/she has the right to go to a medical specialist.	Legal & Ethical Responsibilities
3	Explain to patient that he/she has the right to keep the same physician through a procedure or treatment.	
4	Knowledge of who owns the medical record	Medical Records
5	Knowledge of disability practices (e.g., ADA compliance)	Office Environment
6	Compare and contrast different forms of consent (e.g., implied consent, verbal consent, written consent, expressed consent, implied minor consent).	Legal & Ethical Responsibilities
7	Knowledge of basic medical law and ethics (e.g., assault and battery, patient abandonment)	Legal & Ethical Responsibilities
8	Explain to a patient that he/she has the right to be seen by another physician	
<b>B.</b>	<b>Explain the patients' insurance responsibilities</b>	<b>6 / 7</b>
1	Explain the difference between copayments and coinsurance.	Insurance & Coding
2	Explain deductibles.	Insurance & Coding
3	Explain allowed amounts.	Accounting
4	Basic knowledge of insurance practices	Insurance & Coding

5	Explain the difference between federal and private insurance.	Insurance & Coding
6	Explain an Advanced Beneficiary Notice (ABN)	
7	Knowledge of the contents of an Explanation of Benefits (EOB)	Insurance & Coding
<b>C.</b>	<b>Explain pre- and post-instructions for testing and procedures</b>	<b>1 / 2</b>
1	Provide written documentation on procedure	Written Communication
2	Reiterate to the patient the physician's instructions	
<b>6.</b>	<b>General Office Policies and Procedures</b>	
<b>A.</b>	<b>Perform office opening and closing procedures</b>	<b>9 / 9</b>
1	Check internal and external messages (e.g., phones, emails, faxes).	Office Equipment Telephone Etiquette
2	Check that charts are prepared and ready for the day (or next day).	Office Environment
3	Check that the amount of petty cash for the day is correct.	Accounting
4	Direct and redirect phones to and from answering service to office.	Telephone Etiquette
5	Ensure day sheets are balanced.	Accounting
6	Ensure equipment is turned on at open and off at close.	Office Environment
7	Clean up reception area.	Office Environment
8	Back up data.	Office Equipment
9	Order supplies.	Office Equipment
<b>B.</b>	<b>Greet patients upon arrival</b>	<b>6 / 6</b>
1	Greet patients with a positive attitude.	Office Environment
2	Identify type of visit (e.g., sick or well).	Appointments Office Environment
3	Identify type of patient (i.e., new or existing).	Appointments
4	Ensure front office is free of obstacles.	Office Environment
5	Acknowledge patients upon arrival.	Office Environment
6	Notify patients of wait time.	Appointments Office Environment
<b>C.</b>	<b>Apply telephone etiquette</b>	<b>4 / 4</b>
1	Introduce facility and self.	Telephone Etiquette

2	Identify type of caller.	Telephone Etiquette
3	Identify caller's need.	Telephone Etiquette
4	Check on callers with extended hold times.	Telephone Etiquette
<b>D.</b>	<b>Create correspondences</b>	<b>7 / 8</b>
1	Knowledge of templates	
2	Knowledge of word processing	Word 2: Fundamentals
3	Knowledge of different types of letters	Written Communication
4	Knowledge of different types of correspondences	Written Communication
5	Create letters.	Written Communication
6	Use proper greetings and salutations.	Written Communication
7	Apply proper postage.	Written Communication
8	Obtain required signatures (e.g., who should sign the correspondence?).	Communications Written Communication
<b>E.</b>	<b>Demonstrate basic computer skills</b>	<b>7 / 7</b>
1	Knowledge of e-mail system (e.g., Microsoft Outlook)	Computing Systems
2	Knowledge of word processing (e.g., Microsoft Word)	Word 2: Fundamentals
3	Knowledge of spreadsheets (e.g., Microsoft Excel)	Excel 2: Fundamentals
4	Knowledge of internet (e.g., social media, web searching)	Web Research
5	Use of hardware (e.g., copiers, fax machines, scanners)	Computing Systems Digital Citizenship Office Equipment
6	Basic HIPAA regulations for the use of the computer	Health Information Technology Legal & Ethical Responsibilities
7	Skills at computer software	Getting Started with Microsoft Office
<b>7.</b>	<b>Basic Medical Terminology</b>	
<b>A.</b>	<b>Use medical terminology to communicate with patients and physicians.</b>	<b>2 / 3</b>
1	Basic knowledge of pronunciation	
2	Basic knowledge of spelling	Medical Terminology
3	Basic knowledge of the meaning of terms	Medical Terminology

<b>B.</b>	<b>Recognize abbreviations and acronyms used to complete administrative duties</b>	<b>2 / 2</b>
1	Identify the meaning of abbreviations and acronyms (e.g., HX, Pt, H&P, Dx, SOAP, HIPAA, CC, Rx, PHI, CDC, AMA, HMO, PPO).	Medical Terminology
2	Use of abbreviations and acronyms to complete basic administrative duties	Medical Terminology
<b>C.</b>	<b>Use word parts (i.e., prefixes, roots, suffixes) to define medical terminology</b>	<b>3 / 3</b>
1	Basic knowledge of prefixes (e.g., a-, an-, pre-, post-, hyper-, hypo-, peri-, endo-, exo-)	Medical Terminology
2	Basic knowledge of roots (e.g., cardi/o, vascul/o, gastr/o, nephro/o, hepat/o)	Medical Terminology
3	Basic knowledge of suffixes (e.g., -logy, -itis, -osis, -pathy, -ist, -graph)	Medical Terminology