



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.



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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
Current Event
Accounting Transaction Scenarios

Health Information

Technology

Health Information Technology Overview
Electronic Health Records
Health Insurance Portability and
Accountability Act (HIPAA)
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

Insurance and Coding

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



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Safety Precautions

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

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
Advanced 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
Reflection Questions and Discussion
Resolve Computing Systems Issues
Current Event

Digital Citizenship

Digital Citizenship Choices
Digital Literacy
Digital Communication
Online Safety
Reflection Questions and Discussion
Resolving Issues
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

Office Equipment

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

Microsoft Word Fundamentals

Introduction to Microsoft Word
Paragraph & Document Formatting

Microsoft Excel Fundamentals

Introduction to Microsoft Excel
Microsoft Excel Formatting

| | | |
|-----------|--|--------------|
| 1. | Scheduling | |
| A. | Evaluate different types of patient scheduling | 7 / 9 |
| 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. | |
| 3 | Arrange the procedures in the scheduling book. | |
| 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. | Determine scheduling needs of the facility, as well as new and established patients | 8 / 9 |
| 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) | |
| 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 |
| C. | Follow protocol for no-show, missed, cancelled, or follow-up appointments | 6 / 7 |
| 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 |

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| 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. | |
| D. | Arrange for diagnostic testing and procedures | 6 / 11 |
| 1 | Call for pre-authorization for testing and procedures. | Appointments |
| 2 | Check for referrals prior to appointment. | |
| 3 | Knowledge of participating or non-participating facilities to arrange for diagnostic testing and procedures | |
| 4 | Verify patient billing address for scheduling needs. | Appointments |
| 5 | Verify best method of contact for scheduling appointments. | |
| 6 | Provide patient with instructions for pre-testing or diagnostic procedures. | Appointments |
| 7 | Schedule pre-admission testing. | |
| 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. | |
| E. | Confirm future appointments | 3 / 6 |
| 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. | |
| 3 | Verify patient's insurance is participating with physician's office. | |
| 4 | Knowledge of how to document a no-show, missed, or cancelled appointment | Appointments |
| 5 | Check for referrals prior to appointment. | |
| 6 | Inform patient of co-pay requirement. | Appointments |
| 2. | Patient Intake | |
| A. | Confirm demographic information with patient | 4 / 6 |
| 1 | Maintain appropriate demographic data (e.g., address, phone number, date of birth, insurance information). | Appointments |

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| 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. | Verify insurance information | 10 / 13 |
| 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. | |
| 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 |
| C. | Ensure forms are updated or completed | 1 / 1 |
| 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 |
| D. | Prepare encounter form | 3 / 4 |
| 1 | Knowledge of other practitioners and physicians for referrals | |
| 2 | Basic knowledge of procedures performed in the back office | Accounting |
| 3 | Verify information on encounter form. | Accounting |

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| 4 | Recognize, but do not interpret, basic coding (e.g., ICD, CPT). | Insurance & Coding |
| E. Prepare daily charts | | 5 / 6 |
| 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 |
| 3. Office Logistics | | |
| A. File medical records | | 3 / 5 |
| 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) | Health Information Technology Medical Records |
| B. Perform financial procedures | | 7 / 7 |
| 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 |
| C. Evaluate mail deliveries | | 2 / 3 |
| 1 | Sort and distribute mail. | Written Communication |

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| 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. | |
| 4. | Compliance | |
| A. | Follow HIPAA guidelines | 10 / 14 |
| 1 | Ensure patient's privacy and security of protected health information. | Health Information Technology |
| 2 | Ensure charts are properly secured (e.g., displayed with personal information covered). | |
| 3 | Use a HIPAA-compliant sign-in sheet. | Office Environment |
| 4 | Knowledge of what information is not private for authorities and health departments (e.g., child abuse, STDs/STIs, gunshot wounds, HIV) | |
| 5 | Knowledge of record release forms | Legal & Ethical Responsibilities |
| 6 | Knowledge of who can access patient's chart | |
| 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. | Follow OSHA guidelines | 4 / 4 |
| 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 |

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| 4 | Knowledge of the evacuation plans and emergency procedures | Safety Precautions |
| C. Follow the Center for Medicare/Medicaid Services (CMS) guidelines | | 4 / 5 |
| 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 | |
| 5. Patient Education | | |
| A. Explain the Patients' Bill of Rights | | 6 / 8 |
| 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. Explain the patients' insurance responsibilities | | 6 / 7 |
| 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) | |

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| 7 | Knowledge of the contents of an Explanation of Benefits (EOB) | Insurance & Coding |
| C. | Explain pre- and post-instructions for testing and procedures | 1 / 2 |
| 1 | Provide written documentation on procedure | Written Communication |
| 2 | Reiterate to the patient the physician's instructions | |
| 6. | General Office Policies and Procedures | |
| A. | Perform office opening and closing procedures | 8 / 9 |
| 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). | |
| 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. | Greet patients upon arrival | 6 / 6 |
| 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 |
| C. | Apply telephone etiquette | 4 / 4 |
| 1 | Introduce facility and self. | Telephone Etiquette |
| 2 | Identify type of caller. | Telephone Etiquette |
| 3 | Identify caller's need. | Telephone Etiquette |

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| 4 | Check on callers with extended hold times. | Telephone Etiquette |
| D. Create correspondences | | 7 / 8 |
| 1 | Knowledge of templates | |
| 2 | Knowledge of word processing | Microsoft Word 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 |
| E. Demonstrate basic computer skills | | 7 / 7 |
| 1 | Knowledge of e-mail system (e.g., Microsoft Outlook) | Computing Systems |
| 2 | Knowledge of word processing (e.g., Microsoft Word) | Microsoft Word Fundamentals |
| 3 | Knowledge of spreadsheets (e.g., Microsoft Excel) | Microsoft Excel 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 | Microsoft Office Fundamentals |
| 7. Basic Medical Terminology | | |
| A. Use medical terminology to communicate with patients and physicians. | | 2 / 3 |
| 1 | Basic knowledge of pronunciation | |
| 2 | Basic knowledge of spelling | Medical Terminology |
| 3 | Basic knowledge of the meaning of terms | Medical Terminology |
| B. Recognize abbreviations and acronyms used to complete administrative duties | | 1 / 2 |

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| 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 | |
| C. | Use word parts (i.e., prefixes, roots, suffixes) to define medical terminology | 3 / 3 |
| 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 |