

Medical Office Manager Skill Standards



MEDICAL OFFICE MANAGER SKILL STANDARDS

Critical Work Function	Key Activity	Key Activity	Key Activity	Key Activity	Key Activity	
1. Manage Policies and Procedures for Protected Health Information	1.1 Enforce policies and procedures for protected health information	1.2 Develop forms and/or templates for health information system	1.3 Monitor patient portal	1.4 Inspect paper records		
2. Coordinate Information Technology Resources	2.1 Assess equipment and software inventory	2.2 Maintain practice management software	2.3 Establish business continuity plan	2.4 Troubleshoot hardware equipment problems		
3. Manage Practice Operations	3.1 Identify facility and room logistics needs	3.2 Manage patient scheduling process	3.3 Monitor patient satisfaction	3.4 Establish patient expectations	3.5 Supervise patient recall systems	
4. Manage Human Resources within the Practice	4.1 Conduct staff training and education	4.2 Supervise employees	4.3 Establish staff schedules	4.4 Authenticate staff credentials	4.5 Develop personnel policy manual	
5. Manage the Billing Cycle of the Practice	5.1 Develop billing policies	5.2 Conduct chart audits	5.3 Review billing outcomes	5.4 Analyze bad debt		
6. Manage Risk to the Practice	6.1 Maintain ancillary certifications	6.2 Monitor risk conditions	6.3 Implement grievance protocol	6.4 Implement emergency protocol	6.5 Implement patient no-show protocol	6.6 Ensure continuity of patients' care
7. Manage the Financials of the Practice	7.1 Evaluate revenue resources	7.2 Process accounts payable and payroll	7.3 Prepare practice productivity report	7.4 Develop budget for practice	7.5 Develop policies and procedures for cash controls	7.6 Develop inventory controls
	7.7 Analyze budget performance	7.8 Manage contracts				

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 1. Manage Policies and Procedures for Protected Health Information		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
1.1 Enforce policies and procedures for protected health information	1.1.1 Protected health information breaches are remedied within time specified by HIPAA 1.1.2 Audits for potential breaches reveal areas of policy non-compliance 1.1.3 Breaches of protected health information are identified and documented	Healthcare Regulatory Knowledge HIPAA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/ Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge Worker's Compensation Knowledge	Texas Medical Liability Trust (TMLT) Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 1. Manage Policies and Procedures for Protected Health Information		Occupational Skills, Knowledge & Conditions	
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1.2 Develop forms and/or templates for health information system	1.2.1 Forms contain all necessary and usable information with respect to their function 1.2.2 Forms reduce redundancy and increase efficiency 1.2.3 Forms meet regulatory standards set by federal or state agencies	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/ Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge Worker's Compensation Knowledge	Bookkeeping Software Texas Medical Liability Trust (TMLT) Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Centers for Disease Control (CDC) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Pivot Tables Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Computers Billing Software

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Occupational Title: Medical Office Manager			
Critical Work Function 1. Manage Policies and Procedures for Protected Health Information		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
1.3 Monitor patient portal	1.3.1 Portal reports indicate increasing patient use of portal features 1.3.2 Portal use by patients meets practice utilization goals 1.3.3 New patient forms downloaded and properly utilized by patient as indicated by initial check-in experience 1.3.4 Portal data reflects accurate practice information such as office location, office hours, other contact information, physician data, etc.	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge HIPAA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/ Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge	Texas Medical Liability Trust (TMLT) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Computers

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Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
1.4 Inspect paper records	1.4.1 Audit sheets reflect completeness and accuracy of medical record as defined by federal and state agencies 1.4.2 Paper records consistently pass external audits 1.4.3 Active records reflect age limit as defined by practice policy	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/ Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge Worker's Compensation Knowledge	OSHA Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Centers for Disease Control (CDC) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers Billing Software Steadman's Medical Dictionary and Abbreviations

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 1

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 1 Manage Policies and Procedures for Protected Health Information																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	4	4	4	4	4	3	3	3	4	4	4	3	4	4	3	3

Statement of Assessment for Critical Work Function 1

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event.
- 4) Illustrate by individual performance the attained levels of knowledge and skills.
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 2. Coordinate Information Technology Resources		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
2.1 Assess equipment and software inventory	2.1.1 Inventory data accurately reflects current equipment on hand 2.1.2 All software licenses are active and current 2.1.3 Maintenance and support agreements are up to date 2.1.4 Physical inventory is conducted on a regular basis as defined in practice guidelines	Healthcare Regulatory Knowledge HIPAA Knowledge OSHA Knowledge Knowledge of Stark Law Computer Software Knowledge	OSHA Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Medical Group Management (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 2. Coordinate Information Technology Resources		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
2.2 Maintain practice management software	2.2.1 Billing codes are up to date per federal and state guidelines such as CPT, ICD9/10, HCPCS 2.2.2 Administrative files reflect current information 2.2.3 Practice management software version reflects current regulatory requirements such as 5010	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Computer Software Knowledge	Trailblazer Website IRS Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Pivot Tables Word Processing Software Medical Group Management Association (MGMA) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software Steadman's Medical Dictionary and Abbreviations

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Occupational Title: Medical Office Manager			
Critical Work Function 2. Coordinate Information Technology Resources		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
2.3 Establish business continuity plan	2.3.1 Data backups are performed daily or as required by office policy 2.3.2 Documented policy is in place to define disaster levels and dictate appropriate actions in response 2.3.3 Master Patient Index is on hand and up to date	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Payroll Laws Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge	Bookkeeping Software Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Computers 10-Key Calculator
2.4 Troubleshoot hardware equipment problems	2.4.1 Malfunctions identified and addressed in a timely manner 2.4.2 Repair resources identified and malfunctions corrected as dictated by level of severity	Healthcare Regulatory Knowledge HIPAA Knowledge Fraud and Abuse Knowledge Knowledge of Information Technology	Spreadsheet Software Presentation Software Word Processing Software Computers Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 2

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 2 Coordinate Information Technology Resources																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	4	4	4	4	4	4	3	3	3	3	3	3	3	3	3	3

Statement of Assessment for Critical Work Function 2:

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event.
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 3. Manage the Operations of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
3.1 Identify facility and room logistics needs	3.1.1 Patient flow is not hindered by physical plant layout 3.1.2 All patients have proper seating in waiting area 3.1.3 An isolation area is available for exposure control 3.1.4 emergency exits are clearly identified and clear of obstruction 3.1.5 Office signage follows practice, state, and federal guidelines	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge Grant Management Knowledge General Americans with Disabilities Act (ADA) Knowledge	Texas Medical Liability Trust (TMLT) Website OSHA Website CDC Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools Computers

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 3. Manage the Operations of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
3.2 Manage patient scheduling process	3.2.1 Appointment schedule is designed according to provider preferences to optimize patient volume 3.2.2 Appointments are identified for same day needs 3.2.3 New and established patient visits are scheduled within time limits indicated by NCQA guidelines	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Fraud and Abuse Knowledge Workers Compensation Knowledge	Texas Medical Liability Trust (TMLT) Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 3. Manage the Operations of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
3.3 Monitor patient satisfaction	3.3.1 Patient satisfaction surveys conducted 3.3.2 Results communicated to staff and provider 3.3.3 Office procedures modified as necessary to improve patient satisfaction metrics	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge Fraud and Abuse Knowledge	Texas Medical Liability Trust (TMLT) Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers
3.4 Establish patient expectations	3.4.1 Signage indicates office payment expectations 3.4.2 Patients are given written instructions specific to their condition 3.4.3 Patient registration forms state office and practice protocols such as emergency procedures, refills, and after-hours instructions	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge	Texas Medical Liability Trust (TMLT) Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools Computers

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 3. Manage the Operations of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
3.5 Supervise patient recall systems	3.5.1 Patients get appointment reminder calls 3.5.2 Test results are communicated accurately and within three days as defined in “meaningful use” guidelines 3.5.3 A mechanism to initiate annual physical exam reminders is in operation	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Fraud and Abuse Knowledge	Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Word Processing Software Medical Group Management Association (MGMA) Tools Computers Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 3

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office manager																
CWF 3 Manage the Operations of the Practice																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	4	4	4	4	4	4	3	4	3	4	4	3	4	4	3	3

Statement of Assessment for Critical Work Function 3

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event.
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 4. Manage Human Resources Within the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria	Occupational Skills & Knowledge	Conditions
	<i>How do we know when the key activity is performed well or performed successfully?</i>	<i>What should the technician know and what skills should the technician have in order to do the activity?</i>	<i>What tools must the technician use in order to do the activity?</i>
4.1 Conduct staff training and education	4.1.1 Staff can demonstrate knowledge of Operational Policies & Procedures such as properly processing appointments, as defined in Operational P&P manual 4.1.2 Staff properly implement HIPAA regulations as demonstrated by properly releasing Protected Health Information 4.1.3 Computer screens are not visible to unauthorized users 4.1.4 Staff to not engage in discussions of patient information off premises 4.1.5 Employees follow proper chain of command 4.1.6 Staff can access appropriate resource manuals when requested 4.1.7 Staff are properly trained according to job description as demonstrated by orientation checklist 4.1.8 Operational policies and procedures are developed, documented, and maintained	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Payroll Laws Coding Knowledge OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge	Texas Medical Liability Trust (TMLT) Website OSHA Web site Trailblazer Website CDC Website IRS Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Computers 10-Key Calculator Billing Software Steadman's Medical Dictionary and Abbreviations

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 4. Manage Human Resources Within the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
4.2 Supervise employees	4.2.1 Employees follow proper chain of command 4.2.2 Time and attendance records are current and accurate 4.2.3 Employee grievances are minimized by effective conflict resolution 4.2.4 Turnover rates are monitored and reported	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Payroll Laws Coding Knowledge OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge	OSHA Web site CDC Website IRS Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Pivot Tables Medical Group Management Association (MGMA) Tools Computers 10-Key Calculator
4.3 Establish staff schedules	4.3.1 Office is fully staffed as needed 4.3.2 Staffing does not negatively affect patient flow 4.3.3 Staff are not pulled from their regular job duties to address other positions 4.3.4 Paid time off (PTO) such as holiday, sick, and vacation time protocols are established and executed to ensure proper coverage	Healthcare Regulatory Knowledge Human Resource Laws Payroll Laws IRS Law Knowledge	Texas Medical Liability Trust (TMLT) Website Spreadsheet Software Word Processing Software American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 4. Manage Human Resources Within the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
4.4 Authenticate staff credentials	4.4.1 All clinical staff credentials are current as shown in a review of the credential list or file 4.4.2 Office manager maintains a file of current staff credentials 4.4.3 Background checks on new hires are conducted to authenticate credentials 4.4.4 Periodic reviews of Excluded Provider Lists are conducted	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Payroll Laws OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge	Texas Medical Liability Trust (TMLT) Website OSHA Web site Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 4. Manage Human Resources Within the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria	Occupational Skills & Knowledge	Conditions
	<i>How do we know when the key activity is performed well or performed successfully?</i>	<i>What should the technician know and what skills should the technician have in order to do the activity?</i>	<i>What tools must the technician use in order to do the activity?</i>
4.5 Develop personnel policy manual	4.5.1 Personnel manuals are maintained and updated annually 4.5.2 Staff either receives a copy of the personnel manual or copies are available in a central location 4.5.3 Personnel manual signed by employees upon hire and annually 4.5.4 Changes or revisions to personnel policy manual content are communicated to staff as they occur	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Payroll Laws Coding Knowledge OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge	Texas Medical Liability Trust (TMLT) Website OSHA Web site Trailblazer Website IRS Website Spreadsheet Software Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers 10-Key Calculator

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 4

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 4 Manage Human Resources Within the Practice																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	4	3	3	4	4	4	4	3	4	4	3	3	4	4	3	3

Statement of Assessment for Critical Work Function 4

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event.
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 5. Manage the Billing Cycle of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
5.1 Develop billing policies	5.1.1 Claims are filed within amount of time as defined by billing policies 5.1.2 Co-payments and balances are collected at the time services are rendered as dictated by patient's insurance coverage 5.1.3 Collection Policy is made available to patients through office signage and stated upon patient registration	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge	Bookkeeping Software Texas Medical Liability Trust (TMLT) Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 5. Manage the Billing Cycle of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria	Occupational Skills & Knowledge	Conditions
	<i>How do we know when the key activity is performed well or performed successfully?</i>	<i>What should the technician know and what skills should the technician have in order to do the activity?</i>	<i>What tools must the technician use in order to do the activity?</i>
5.2 Conduct chart audits	5.2.1 Audit sheets reflect completeness and accuracy of medical record as defined by internal, federal, and state guidelines 5.2.2 AMA and CPT standards are applied to medical record documentation 5.2.3 Charts sustain external audits such as Recovery Audit Contractors (RAC), Center of Medicare and Medicaid Services (CMS), Medicaid, Managed Care audits	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge	Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Pivot Tables Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software Steadman's Medical Dictionary and Abbreviations

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 5. Manage the Billing Cycle of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria	Occupational Skills & Knowledge	Conditions
	<i>How do we know when the key activity is performed well or performed successfully?</i>	<i>What should the technician know and what skills should the technician have in order to do the activity?</i>	<i>What tools must the technician use in order to do the activity?</i>
5.3 Review billing outcomes	5.3.1 Front end claim rejections are below stated practice percentages (typically < 4%) 5.3.2 Billing codes up to date per federal and state guidelines such as CPT, ICD9/10, HCPCS 5.3.3 A/R Aging falls below set practice standards	Healthcare Regulatory Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge	Texas Medical Liability Trust (TMLT) Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 5. Manage the Billing Cycle of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
5.4 Analyze bad debt	5.4.1 All bad debt has been authorized with appropriate signature 5.4.2 Bad debt ratio falls at or below practice standard defined by billing policy 5.4.3 Collection agency reports are reviewed regularly	Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Fair Debt Collection Practices Act	Bookkeeping Software Texas Medical Liability Trust (TMLT) Website IRS Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Coding Books Evaluation and Management Codes Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 5

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 5 Manage the Billing Cycle of the Practice																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
3	3	3	4	3	3	3	2	3	3	3	3	2	3	3	4	3

Statement of Assessment for Critical Work Function 5

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event.
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 6. Manage Risk to the Practice (from liabilities, violations, and suits)		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
6.1 Maintain ancillary certifications	6.1.1 Ancillary (such as Lab (CLIA) and X-ray services) certifications are current 6.1.2 Practice passes ancillary certification surveys imposed by regulatory bodies 6.1.3 Equipment calibration logs are maintained daily or as required by regulatory bodies	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge	OSHA Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Computers
6.2 Monitor risk conditions	6.2.1 Facility is ADA compliant within office manager's control 6.2.2 Out of compliant conditions are reported to appropriate entity for correction 6.2.3 Appropriate actions are taken to address injuries, accidents, or other hazards to the practice, such as Incident Reports, Worker's Comp forms, and Medication Logs.	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Human Resource Laws OSHA Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Fraud and Abuse Knowledge Worker's Compensation Knowledge	Texas Medical Liability Trust (TMLT) Website OSHA Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/American Academy of Professional Coders (AAPC)/Practice Management Institute Tools

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 6. Manage Risk to the Practice (from liabilities, violations, and suits)		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
6.3 Implement grievance protocol	6.3.1 Patient and staff complaints are addressed as referenced in the practice grievance protocol 6.3.2 Patient complaints are documented and filed in a secure location and away from the patient chart 6.3.3 Staff complaints are documented and filed appropriately 6.3.4 Attorney or outside agency is contacted when appropriate	Healthcare Regulatory Knowledge HIPAA Knowledge Fraud and Abuse Knowledge	Texas Medical Liability Trust (TMLT) Website Word Processing Software American Health Information Management Association (AHIMA)/American Academy of Professional Coders (AAPC)/Practice Management Institute Tools Computers
6.4 Implement emergency protocol	6.4.1 Safety drills conducted as defined in emergency policy(ies) 6.4.2 Response to patient emergencies carried out as defined in policy 6.4.3 Response to staff emergencies carried out as defined in policy 6.4.4 Drills and emergency responses are documented as defined in policy 6.4.5 Natural disaster drills conducted as defined in policy	Healthcare Regulatory Knowledge HIPAA Knowledge Fraud and Abuse Knowledge Workers Compensation Knowledge	Word Processing Software American Health Information Management Association (AHIMA)/American Academy of Professional Coders (AAPC)/Practice Management Institute Tools Computers
6.5 Implement patient no-show protocol	6.5.1 All no-shows are documented in the patient chart 6.5.2 No-show follow-up attempts are documented 6.5.3 Appropriate medical staff notified of no-shows or missed orders 6.5.4 High risk NO SHOWs are referred to health care provider for appropriate action	Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Workers Compensation Knowledge	Word Processing Software American Health Information Management Association (AHIMA)/American Academy of Professional Coders (AAPC)/Practice Management Institute Tools Computers

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 6. Manage Risk to the Practice (from liabilities, violations, and suits)		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria	Occupational Skills & Knowledge	Conditions
	<i>How do we know when the key activity is performed well or performed successfully?</i>	<i>What should the technician know and what skills should the technician have in order to do the activity?</i>	<i>What tools must the technician use in order to do the activity?</i>
6.6 Ensure continuity of patients' care	6.6.1 Medical record requests are filled as statutorily defined 6.6.2 Referrals are made in a timely manner as defined by the health care provider 6.6.3 Referral documentation is complete as indicated by recipient	Knowledge of Joint Commission of Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge HIPAA Knowledge Coding Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Workers Compensation Knowledge	Texas Medical Liability Trust (TMLT) Website Trailblazer Website Texas Medicaid Healthcare Provider (TMHP) Website Center for Medicare and Medicaid Services (CMS) Website Word Processing Software American Health Information Management Association (AHIMA)/American Academy of Professional Coders (AAPC)/Practice Management Institute Tools Computers

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 6

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 6 Manage Risk to the Practice																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	3	3	3	4	4	4	3	3	3	3	3	3	4	4	3	3

Statement of Assessment for Critical Work Function 6

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.1 Evaluate revenue resources	7.1.1 Accounts receivable is fewer than 120 days aged unless specifically identified as extraordinary 7.1.3 Patient statements are sent out according to established schedule, typically monthly 7.1.2 Collection report is current	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge Coding Knowledge Clinical Laboratory Improvement Amendments (CLIA)/Cornell Organization for Labor Action (COLA) Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge IRS Law Knowledge	Bookkeeping Software Texas Medical Liability Trust (TMLT) Website Center for Medicare and Medicaid Services (CMS) Website Spreadsheet Software Pivot Tables Word Processing Software Medical Group Management Association (MGMA) Tools Coding Books Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software
7.2 Process accounts payable and payroll	7.2.1 Invoices are within 30- and 60- day aging limits 7.2.2 External audits reveal no inconsistencies 7.2.3 No errors revealed on pay stubs 7.2.4 Payroll tax payments (federal and state) are current	Healthcare Regulatory Knowledge Human Resource Laws Payroll Laws Fraud and Abuse Knowledge IRS Law Knowledge	Bookkeeping Software IRS Website Spreadsheet Software Pivot Tables Word Processing Software Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.3 Prepare practice productivity reports	7.3.1 Production reports generated monthly/quarterly/annually as required 7.3.2 Production reports accurately reflect physician services rendered within the month 7.3.3 IRS or accountant audit matches internal audit	Healthcare Regulatory Knowledge Payroll Laws Coding Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge	Bookkeeping Software Spreadsheet Software Pivot Tables Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.4 Develop budget for practice	7.4.1 Budget approved by the owner of the practice 7.4.2 Budget comparison to actuals is reported and appropriate adjustments made 7.4.3 Cash flow reports generated as required 7.4.4 Spending that exceeds any budget category is justified with appropriate documentation	Knowledge of National Committee for Quality Assurance (NCQA) Resources Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO) Healthcare Regulatory Knowledge Human Resource Laws Payroll Laws Coding Knowledge OSHA Knowledge Knowledge of Stark Law Fraud and Abuse Knowledge Worker's Compensation Knowledge IRS Law Knowledge Grant Management Knowledge	Bookkeeping Software IRS Website Spreadsheet Software Pivot Tables Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.5 Develop policies and procedures for cash controls	7.5.1 Internal controls related to cash are documented and published 7.5.2 Cross checks for accuracy completed as required and results published 7.5.3 Tracking of a check through the process reveals that internal controls are effective. 7.5.4 Cash flow reports are generated as required 7.5.5 Bank statements are accurately reconciled 7.5.6 Cash control procedures pass an outside audit	Healthcare Regulatory Knowledge Human Resource Laws Payroll Laws Knowledge of Stark Law Fraud and Abuse Knowledge IRS Law Knowledge	Bookkeeping Software IRS Website Spreadsheet Software Presentation Software Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Computers 10-Key Calculator Billing Software
7.6 Develop inventory controls	7.6.1 Supplies are on hand when needed 7.6.2 Discarded medication is logged appropriately 7.6.3 Documentation supports medication Sample count	Healthcare Regulatory Knowledge Fraud and Abuse Knowledge	Bookkeeping Software Spreadsheet Software Word Processing Software Medical Group Management Association (MGMA) Tools Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.7 Analyze budget performance	7.7.1 Budget comparison to actuals is reported and appropriate adjustments made 7.7.2 Cash flow reports generated as required 7.7.3 Spending that exceeds any budget category is justified with appropriate documentation 7.7.4 Spending caps are not exceeded	Knowledge of National Committee for Quality Assurance (NCQA) Resources Healthcare Regulatory Knowledge Human Resource Laws Coding Knowledge	Bookkeeping Software Spreadsheet Software Pivot Tables Word Processing Software Medical Group Management Association (MGMA) Tools American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools Fee Analyzers Medicare Fee Schedule Computers 10-Key Calculator Billing Software

MEDICAL OFFICE MANAGER SKILL STANDARDS

Occupational Title: Medical Office Manager			
Critical Work Function 7. Manage the Financials of the Practice		Occupational Skills, Knowledge & Conditions	
Key Activity	Performance Criteria <i>How do we know when the key activity is performed well or performed successfully?</i>	Occupational Skills & Knowledge <i>What should the technician know and what skills should the technician have in order to do the activity?</i>	Conditions <i>What tools must the technician use in order to do the activity?</i>
7.8 Manage contracts	<p>7.8.1 Staffing contracts accurately reflect details agreed during staff negotiation, such as salary, benefits, leave, etc.</p> <p>7.8.2 Managed care contracts are negotiated such that the fee schedule is within reasonable limits (at least 175% of the Medicare fee schedule).</p> <p>7.8.3 Deficiencies in delivery of both service contract and equipment contract deliverables are addressed and documented as defined in the contract.</p> <p>7.8.4 Service contracts are evaluated and renegotiated on a periodic schedule as indicated by established practice policies and procedures.</p>	<p>Knowledge of National Committee for Quality Assurance (NCQA) Resources</p> <p>Knowledge of Joint Commission for Accreditation of Healthcare Organizations (JCAHO)</p> <p>Healthcare Regulatory Knowledge</p> <p>HIPAA Knowledge</p> <p>Coding Knowledge</p> <p>OSHA Knowledge</p> <p>Clinical Laboratory Improvement Amendments (CLIA)/ Cornell Organization for Labor Action (COLA) Knowledge</p> <p>Knowledge of Stark Law</p> <p>Fraud and Abuse Knowledge</p> <p>IRS Law Knowledge</p> <p>Grant Management Knowledge</p>	<p>Texas Medical Liability Trust (TMLT) Website</p> <p>Trailblazer Website</p> <p>Texas Medicaid Healthcare Provider (TMHP) Website</p> <p>Center for Medicare and Medicaid Services (CMS) Website</p> <p>Spreadsheet Software</p> <p>Pivot Tables</p> <p>Word Processing Software</p> <p>Medical Group Management Association (MGMA) Tools</p> <p>American Health Information Management Association (AHIMA)/ American Academy of Professional Coders (AAPC)/ Practice Management Institute (PMI) Tools</p> <p>Fee Analyzers</p> <p>Medicare Fee Schedule</p> <p>Computers</p> <p>10-Key Calculator</p> <p>Billing Software</p>

MEDICAL OFFICE MANAGER SKILL STANDARDS

Academic and Employability Knowledge and Skill Matrix for Critical Work Function 7

On a scale of 1 (lowest) to 5 (highest), identify the level of complexity required in each of these skills for the worker to perform the critical work function. Keep in mind that this scale is not for rating an individual's proficiency. It is intended only for rating the level of complexity required to do the work.

Occupational Title: Medical Office Manager																
CWF 7 Manage the Financials of the Practice																
Listening	Speaking	Using Information and Communication Technology	Gathering and analyzing Information	Analyzing and Solving Problems	Making Decisions and Judgments	Organizing and Planning	Using Social Skills	Adaptability	Working in Teams	Leading Others	Building Consensus	Self and Career Development	Writing	Reading	Mathematics	Science
4	3	4	4	4	4	4	3	3	3	3	3	2	4	4	4	3

Statement of Assessment for Critical Work Function 7

The statements of assessment can do any of several things:

- Define tools or strategies that industry could use to assess the level of competency a worker has attained in a particular critical work function.
- Define for trainers and educators how to assess the level of competency a student has attained relevant to the critical work function.
- Define the level of mastery of the critical work function that indicates that a worker or student has achieved an entry-, intermediate-, or advanced level of mastery of a critical work function.

A. Tests could include:

- 1) Multiple choice and essay questions that demonstrate an understanding of knowledge being assessed.
- 2) Preparation and justification of a reasonable solution to a problem scenario.

B. Hands-on exercises or simulations to demonstrate acquisition of knowledge and skills that could:

- 1) Apply relevant knowledge or skills
- 2) Focus on the application of knowledge and skills to a new situation
- 3) Demonstrate an ability to plan, organize, and create a product, service, or an event
- 4) Illustrate by individual performance the attained levels of knowledge and skills
- 5) Include observation of events, groups, and individuals that focuses on the relevant traits of the skill in question