

The Administrative Medical Assistant's Career

CHAPTER 1

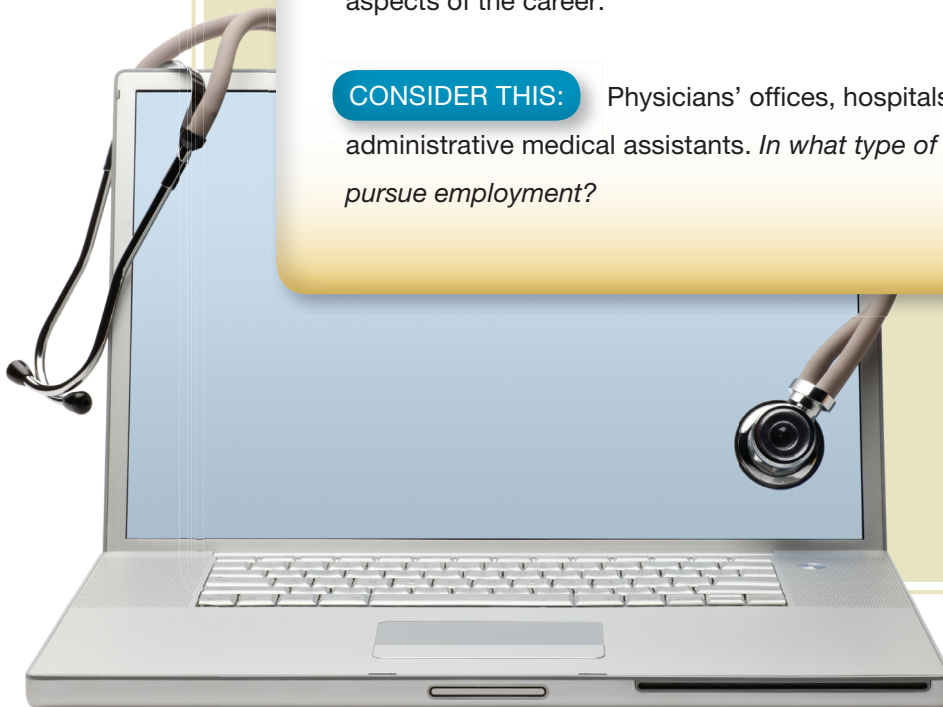
The Administrative Medical Assistant

CHAPTER 2

Medical Ethics, Law, and Compliance

Welcome to *Medical Office Procedures*! This program has been written specifically to provide you with the skills and knowledge you will need to succeed. In Part 1, you will learn about the role of the administrative medical assistant, as well as legal and ethical aspects of the career.

CONSIDER THIS: Physicians' offices, hospitals, clinics, and other employers hire administrative medical assistants. *In what type of medical setting do you intend to pursue employment?*



The Administrative Medical Assistant



LEARNING OUTCOMES

After studying this chapter, you will be able to:

- 1.1 Describe the tasks and skills required of an administrative medical assistant.
- 1.2 List and define at least three personal attributes essential for an administrative medical assistant.
- 1.3 Describe the employment opportunities in various medical settings and specialties and nonmedical settings.
- 1.4 Identify and define at least six positive work attitudes that contribute to the work ethic and professionalism of an administrative medical assistant.
- 1.5 List three advantages of professional affiliation and certification.
- 1.6 Apply elements of good interpersonal communication to relationships with patients and others within the medical environment.

KEY TERMS

Study these important words, which are defined in this chapter, to build your professional vocabulary:

AAMA	certification	good judgment	punctuality
accuracy	confidentiality	honesty	self-motivation
administrative medical assistant (AMA)	dependability	IAAP	tact
AHDI	efficiency	initiative	team player
AMT	empathy	maturity	thoroughness
assertiveness	ethnocentrism	problem-solving	work ethic
	flexibility	professional image	

Chapter

1

ABHES

- Adapt to change.
- Maintain confidentiality at all times.
- Project a positive attitude.
- Be cognizant of ethical boundaries.
- Express a responsible attitude.
- Conduct work within scope of education, training, and ability.
- Professionalism components.
- Orient patients to office policies and procedures.
- Adapt what is said to the recipient's level of comprehension.
- Adaptation for individualized needs.
- Instruct patient with special needs.
- Locate resources and information for patients and employers.
- Use proper telephone techniques.
- Be courteous and diplomatic.
- Serve as a liaison between the physician and others.
- Exercise efficient time management.
- Receive, organize, prioritize, and transmit information expediently.
- Show a responsible attitude.

CAAHEP

- ➔ Identify styles and types of verbal communication.
- ➔ Recognize communication barriers.
- ➔ Identify techniques for overcoming communication barriers.
- ➔ Recognize the elements of oral communication using a sender/receiver process.
- ➔ Identify resources and adaptations that are required based on individual needs, i.e., culture and environment, developmental life stage, language, and physical threats to communication.
- ➔ Recognize the role of patient advocacy in the practice of medical assisting.
- ➔ Discuss the role of assertiveness in effective professional communication.
- ➔ Identify time management principles.
- ➔ Use reflection, restatement, and clarification techniques to obtain patient history.
- ➔ Instruct patients according to their needs.
- Apply active listening skills.
- Demonstrate sensitivity appropriate to the message being delivered.

- ➔ Cognitive
- ➔ Psychomotor
- Affective

INTRODUCTION

As the population ages, new healthcare reforms are implemented, and newer technologies, medicine, and treatments are introduced into the healthcare industry, the opportunities for rewarding careers in medical environments increase. These changes also pose new challenges for healthcare professionals. Legal and ethical issues abound. Following procedures that comply with

government regulations concerning patients' privacy is also critical.

Because of rapid changes and the increasing complexity of the industry, continuing education is necessary to succeed in performing the role of an administrative medical assistant. Equally important is exhibiting the personal attributes and work ethic that contribute to the smooth and efficient operation of the medical practice team.

1.1 TASKS AND SKILLS

Medical assistants are medical office professionals who capably perform a number of tasks in a wide variety of settings. Administrative tasks are those procedures used to keep the offices in medical practices running efficiently. Clinical tasks are those procedures the medical assistant may perform to aid the physician in the medical treatment of a patient. A committee was formed in 1996 by the American Association of Medical Assistants. The committee's goal was to revise and update standards for the accreditation of programs that taught medical assisting. Findings of the committee were published in 1997 as the "AAMA Role Delineation Study: Occupational Analysis of the Medical Assisting Profession." The Role Delineation Chart outlines the areas of competence you must master as an entry-level medical assistant. The chart was further updated in 2003 and 2009 to include additional competencies. The Medical Assistant Role Delineation Chart provides the basis for medical assisting and evaluation. All students in an accredited medical assisting program are required to master three areas of competence: clinical, administrative, and general. The AAMA Role Delineation Chart is also a good reference source that identifies the skills, duties, and procedures that medical assistants (administrative and clinical) are educated to perform. For more information on the AAMA, please visit <http://www.aama-ntl.org>.

This textbook concentrates on administrative responsibilities, which involve the personal traits and technical skills required in most medical office careers. Throughout the text, the **administrative medical assistant** is often referred to as the "assistant," or as the **AMA** rather than by the full title.

Administrative Medical Assisting Tasks

The administrative medical assistant (AMA) is a professional office worker dedicated to assisting in the care of patients. To effectively perform all the required tasks, an assistant must be proficient in a number of skills.

The following are the major categories of tasks performed by an administrative medical assistant:

- Front desk procedures
- Scheduling
- Records management
- Administrative duties
- Billing and insurance

Front Desk. The administrative medical assistant greets patients and other visitors, such as family members and pharmaceutical representatives. The assistant also verifies and updates personal data about patients, explains the fees that will be charged for services, collects payments, and guides patients through their medical office encounters.

Scheduling. The administrative medical assistant answers the telephone; schedules either by phone or in person future office appointments and out-of-office encounters, such as hospital admissions, laboratory testing, and referrals to specialists; and forwards telephone calls according to office procedures.

Records Management. The administrative medical assistant creates and maintains patient medical records (sometimes referred to as charts); stores and retrieves the records for use during encounters with physicians; and files other kinds of documents. In offices using electronic health records, the assistant begins the electronic chart by inputting patient demographic and financial information into the electronic database. As many offices

begin the process of converting to electronic health records, the assistant may assume the responsibility for scanning hard copy charts into the electronic health record's database.

Administrative Duties. The administrative medical assistant opens and sorts incoming mail, composes routine correspondence, and may transcribe physicians' dictation. The assistant also maintains physicians' schedules, which involves keeping track of the time required for office encounters with patients, meetings, and conferences, as well as coordinating patients' hospital admissions and surgical procedures.

Billing and Insurance. The administrative medical assistant codes or verifies codes for diagnoses and procedures; processes and follows up on insurance claims, posts payments and prepares patients' bills; assists with banking duties; guides patients to available financial arrangements for payment; and maintains financial records.

Administrative Medical Assisting Skills

The work of an administrative medical assistant, which requires many technical and personal skills, is interesting and varied. The role of the AMA differs from that of the clinical medical assistant in that the clinical portion deals exclusively with the performance of medical tasks, such as taking blood samples and preparing a patient for a medical procedure. AMAs focus on administrative tasks ("front office skills"), such as those listed below.

Communication Skills. The assistant must understand and use correct English grammar, style, punctuation, and spelling in both writing and speaking. These skills enable the assistant to handle correspondence, medical records, and transcription and to interact well with other staff members, patients, and other medical personnel.

Electronic communications is the most common and efficient mode of communication for many messages. Even though this method of communication is fast, it requires proper grammar, punctuation, and structure. Taking the time to proofread any document prior to transmission is extremely important. Errors lead to misinformation which can lead to mistreatment.

Our nonverbal communication style is as important, sometimes more important, in the communication cycle as our verbal message. Body posture, voice tonality, and facial expressions are just a few examples of our nonverbal communications techniques. We will discuss communication skills more in depth in a future chapter.

Communicating with other medical personnel requires the knowledge, correct spelling, and proper use of medical terminology including nationally recognized medical abbreviations. Both correct pronunciation and written usage of the medical language are essential communication skills within the medical environment.

Mathematics Skills. The assistant must have good math skills to be able to maintain correct financial records, bill patients, and order and arrange payment for office supplies. Many questions asked of the medical office assistant involve a patient's financial responsibility—for example, what will be the patient's balance after insurance has paid its portion. Addition, subtraction, and percentage calculations are three math skills the assistant needs. Extracting payment information from insurance data and correctly posting to patient accounts are another area of responsibility for the AMA.

Organizational Skills. Controlling the usually hectic pace of work requires the assistant to have the skills of managing time and setting priorities. Systematic work habits, the willingness to take care of details, and the ability to handle several tasks at the same time (multitasking) are essential. Scheduling, updating and maintaining records, and keeping an orderly office require strong organizational skills. The most organized individual may still encounter many

COMPLIANCE TIP

The administrative medical assistant plays an important role in ensuring that the medical office's procedures comply with government regulations concerning patients' records. These rules include keeping patient information private and following guidelines for release of this information. Chapter 2 presents information on how to stay in compliance.

days when established priorities must be rearranged. Flexibility is another essential organizational skill needed by the medical office assistant.

Data Entry Skills. Accuracy in keying data and proficiency in proofreading are vital skills in the medical office. Patient personal and financial information is keyed into the electronic database and assimilated with the medical data to produce health claim forms and patient billings, as well as many other types of integrated reports. Errors in keyed information can have drastic effects on financial and medical information. As an example, a physician prescribes .025 mg of a medication and the information is keyed erroneously as 0.25 mg. The patient may suffer serious or fatal complications, and the practice could incur legal consequences.

AMAs must possess strong keyboarding and word processing skills, including mastery of the alpha, numeric, and symbols keys and functions, such as mail merge, in order to effectively process medical data. Producing professional letters, manuscripts, envelopes, and reports sends a nonverbal message about the professionalism of the office. Templates for chart notes and other commonly used formats save time and provide fewer opportunities for errors.

Computer and Equipment Skills. A basic understanding of a variety of technologies and the ability to use computers with mastery are essential workplace skills. Computers are used in every kind of healthcare setting for many different tasks. Computer programs handle word processing, financial spreadsheets, databases, and charts and visuals for speeches and presentations. With practice management programs, the assistant may handle billing, scheduling, account updating, records management, integrated reports (such as aging reports for patients and payors), and other tasks. Electronic scheduling is a popular feature because of its ease of searching and time-saving convenience.

Wireless technologies allow healthcare professionals who are away from their offices or hospitals to contact staff members and computers from any location. They also have constant accessibility to patient records through electronic health records programs, which are currently being defined by the federal government. Voice-recognition technology enables the physician to dictate notes using voice commands. The use of e-mail to communicate is as widespread as telephone communication, both within the medical practice and among medical practices, hospitals, and insurance companies.

To assist effectively in patient care, the medical assistant must be able to use a computer to:

- Process claims and bills and perform other routine financial tasks.
- Maintain the office schedule.
- Edit, revise, and generate documents.
- Scan and send documents to other locations.
- Communicate through e-mail within and outside the workplace.
- Research and obtain information from computer sources, such as the Internet.

Knowing how to use basic technologies, such as copiers and fax machines, has long been a requirement for every office professional. Scanners, calculators, and multiple-line telephone systems are also standard office equipment. Records must be kept on service agreements, in addition to warranties, repair records, and instructional materials for each piece of equipment. Knowing where and whom to call when equipment malfunctions is

critical to the efficient flow of the office environment. Continuing to develop computer skills and learning new technological applications are crucial to the effectiveness and career advancement for administrative medical assistants.

Interpersonal Skills. Excellent interpersonal skills often come from a genuine desire to work with people. This desire and these interpersonal skills are essential for the administrative medical assistant, who is usually the patient's first contact with the medical office. That contact sets the tone for the patient's visit and influences the patient's opinion of the physician and the practice.

Many patients need someone to assist them with understanding the medical jargon sent to them from parties such as an insurance carrier. The medical office assistant serves as a liaison for the patient to help him or her translate the insurance language into everyday language and explain other medical office information.

The assistant skilled in positive communication with patients is warm, open, and friendly. Patients appreciate attention and concern—for their schedules and their comfort. Effective interpersonal skills involve looking directly at the person being spoken to, speaking slowly and clearly, listening carefully, and checking for understanding of the communicated message.

Respect for and openness to the other person are often shown by a pleasant facial expression and a genuine, natural smile. At the heart of interpersonal skills is sensitivity to the feelings and situations of other people.

1.2 ADMINISTRATIVE MEDICAL ASSISTING PERSONAL ATTRIBUTES

In addition to essential office skills, the success of the administrative medical assistant depends on a positive attitude toward work and a cheerful personality. *Personality* has been defined as the outward evidence of a person's character. Many aspects of personality are important in dealing with patients and other medical professionals.

Because patients entering a healthcare setting may be anxious, fearful, or unwell, most of them value a friendly, pleasant personality as the most important attribute of a medical assistant. The qualities discussed here are components of a pleasant personality and are useful professional and personal skills.

Genuine Liking for People

A genuine enjoyment of people and a desire to help them are keys to success in a medical assisting career. These qualities are expressed in the way you communicate with people through speech and body language.

Because patients may worry that they will be viewed only as numbers and notes on their patient charts, it is important that they feel recognized as individuals. In communicating with patients, your warmth and attentiveness help reassure patients and signal your desire to help. Looking directly at the patient and listening with attention communicate acceptance of the person. A pleasant facial expression, a natural smile, and a relaxed rather than rigid body posture are all body language signs that express openness and acceptance.

Viewing yourself and colleagues as integral medical office team members creates an atmosphere of cooperation and respect for individual differences. At times, personalities may seem to be in conflict; however, the individual who has a genuine liking of people will be able to respect differences within the team environment and accentuate the positiveness of cooperation through differences. Individuals change or lose positions more frequently due to the inability to get along with others than they do for lack of skills. Never underestimate the value of an open mind and of "playing nicely."



Figure 1.1

The administrative medical assistant enjoys working with people. How do assistants show their care and concern for patients?

Cheerfulness

The ability to be pleasant and friendly is an asset in any career. Lifting patients' spirits helps build goodwill between them and the physician. A pleasant assistant can frequently head off difficulties that occur when patients become worried, anxious, confused, or irritable.

EXAMPLE

It is five o'clock, normal closing time for the office. The doctor is behind schedule because of several difficult cases, and there are two patients yet to be seen in the waiting room. One of the patients approaches the assistant.

Patient: I've been waiting a long time to see the doctor. How much longer will I have to wait?

Despite feeling tired at the end of the day and ready to go home, the assistant remains cheerful and explains the situation without frustration.

Assistant: Dr. Larsen has had several difficult cases today that have caused this delay. She will see you next, but it may be another 20 to 30 minutes.

In the above example, the patient may be feeling forgotten or ignored. Frequently, delays do occur. Patients should be kept apprised of delays and given the opportunity to choose to continue to wait or to reschedule their appointment.

Empathy

Many of the personal traits needed to be a successful medical assistant spring from **empathy**, a sensitivity to the feelings and situations of other people. Empathy enables you to understand how a patient feels because you can mentally put yourself in the patient's situation. Empathetic phrases such as "Insurance forms can be confusing" or "You seem confused, may I help?" may be used to show the patient you are concerned about his or her situation. Phrases that emphasize yourself or give false impressions, such as "I completely understand how you feel," should be avoided. Everyone has had some personal experience with an illness

or with not feeling perfectly well. Reminding yourself of how you felt and of how you wanted to be treated in that situation will help you treat patients with kindness.

EXAMPLE

Assistant: Mr. Strauss, I realize you are not feeling well after your surgery yesterday. Would you feel more comfortable lying down while you wait?

Understand that nervous patients may not be listening clearly to your instructions. Offering to repeat them and answering questions are other examples of empathy.

1.3 EMPLOYMENT OPPORTUNITIES

The U.S. Department of Labor projects this field will grow much faster than the average, ranking medical assistants among the fastest growing occupations for the 2008–2018 decade. In 2008, the Department of Labor reported 483,600 persons employed as medical assistants, with a projected 647,500 employed in 2018, a 34 percent increase. Fueling the rapid growth are advances in technologies, an aging population, and healthcare reform. Job opportunities are predicted to be excellent, especially for those with formal training, experience, and/or certification. Administrative medical assistants have opportunities to advance into management positions, such as office manager or compliance officer. There are many organizations, institutions, and companies that operate in areas within or closely related to healthcare. Workers familiar with the healthcare environment are of value and in demand.

A thorough training in technical skills, the development of good interpersonal skills, and ongoing professional development help ensure a successful career for administrative medical assistants. Because the healthcare industry is booming, a well-trained medical assistant has a wide variety of opportunities in many different settings.

Physician Practice

The most common place of employment for the administrative medical assistant is in a physician practice. The majority of physicians are associated with a group practice—in which space, staff, and physical resources, such as equipment and laboratory facilities, are shared. A group practice may consist of physicians who are all generalists or who all have the same specialty, or it may be a combination of generalists and specialists.

There are many advantages to both doctors and patients in these larger practices. Doctors may better control spiraling overhead costs of operating an office. Such practices also give new physicians the opportunity to join an established practice and to acquire new patients to add to their clientele. Because of the large volume of patients, the administrative medical assistant may specialize in a task area, such as patient scheduling, or may perform a variety of duties.

Some administrative medical assistants work in a small office where one or two physicians practice. The assistant acts as the doctor's right hand, taking care of all administrative tasks. Working in a small office gives the assistant a great deal of responsibility, variety in the tasks to be done, and an opportunity to develop close ties with patients and the physician.

There are job opportunities for assistants in a wide range of practices. Many such medical specialties are listed and defined in Figure 1.2. In addition to these specialties, the American Medical Association (AMA) lists 170 others. Many of the specialties on this expanded list are surgical practices related to the specialties shown in Figure 1.2. However, there are also specialties that deal with new areas, such as undersea and aerospace medicine. Other specialties reflect the increased use of new technologies to treat illness. Interventional radiology is an example of such a specialty; it uses tools guided by radiologic imaging to perform procedures that are less invasive than those required with surgery.

Figure 1.2 Examples of Medical Specialties and Subspecialties

Addiction Medicine: An addiction medicine specialist is a physician who diagnoses and treats the complications of substance abuse addiction, including the physical and psychological complications.

Allergy: An allergist diagnoses and treats adverse reactions to foods, drugs, and other substances.

Anesthesiology: An anesthesiologist maintains pain relief and stable body functions of patients during surgical procedures.

Bariatric: A bariatric physician specializes in the causes, treatment, and prevention of obesity.

Chiropractic: This discipline studies the disease process as a result of deviations/changes to the normal workings of the nervous system. Common treatment options include body manipulation and other forms of therapy.

Dentistry: A dentist is concerned with the care and treatment of teeth and gums, especially prevention, diagnosis, and treatment of deformities, diseases, and traumatic injuries.

Subspecialties include the following:

An **endodontist** specializes in root canal work.

A **forensic** dentist applies dental facts to legal issues.

An **oral surgeon** specializes in jaw surgery and extractions.

An **orthodontist** straightens teeth.

A **pedodontist** provides dental care for children.

A **periodontist** specializes in gum disease.

A **prosthodontist** specializes in dentures and artificial teeth.

Dermatology: A dermatologist diagnoses and treats diseases of the skin and related tissues.

Emergency Medicine: An emergency room physician provides immediate treatment of accidents and illnesses.

Family Practice: A family practice physician provides total healthcare for the family.

Geriatrics: This field of medicine diagnoses and treats conditions and diseases that are specific to the older population.

Hospice: This field of medicine renders interdisciplinary care to individuals with life-threatening conditions. Physical (pain management), psychological, and spiritual services are given to the patient and the family. The primary focus of hospice care is quality of life.

Gynecology: A gynecologist is concerned with the diseases of the female genital tract, as well as female endocrinology and reproductive physiology.

Internal Medicine: An internist diagnoses a wide range of nonsurgical illnesses. Subspecialties include the following:

Cardiovascular Medicine: A cardiologist diagnoses and treats diseases of the heart, blood vessels, and lungs.

Endocrinology: An endocrinologist diagnoses and treats endocrine gland diseases.

Gastroenterology: A gastroenterologist diagnoses and treats diseases of the digestive tract and related organs.

Gerontology: A gerontologist treats the process and problems of aging.

Hematology: A hematologist diagnoses and treats diseases of the blood.

Immunology: An immunologist diagnoses and treats symptoms of immunity, induced sensitivity, and allergies.

Infectious Disease: A specialist in infectious disease diagnoses and treats all types of infectious diseases.

Nephrology: A nephrologist diagnoses and treats disorders of the kidneys and related functions.

Oncology: An oncologist diagnoses and treats cancer.

Pulmonary Disease: A pulmonologist diagnoses and treats lung disorders.

Rheumatology: A rheumatologist is concerned with the study, diagnosis, and treatment of rheumatic conditions.

Neurology: A neurologist diagnoses and treats disorders of the nervous system.

Obstetrics: An obstetrician provides care during pregnancy and childbirth.

Occupational Medicine: A specialist in occupational medicine works with companies to prevent and manage occupational and environmental injury, illness, and disability and to promote health and productivity of workers and their families and communities.

Ophthalmology: An ophthalmologist cares for the eyes and vision.

Osteopathology: This field of medicine specializes in the diagnosis and treatment of the neuromusculoskeletal system.

Orthopedics: An orthopedic surgeon or orthopedist provides treatment of the musculoskeletal system.

Otorhinolaryngology: A physician in otorhinolaryngology specializes in the diagnosis and treatment of illnesses of the ears, nose, and throat (ENT).

Pathology: A pathologist investigates the causes of disease using laboratory techniques.

Pediatrics: A pediatrician specializes in the comprehensive treatment of children.

Physical Medicine/Rehabilitation: A physiatrist evaluates and treats all types of disease through physical means, such as heat.

Plastic Surgery: A plastic surgeon repairs and reconstructs body structures through surgical means.

Psychiatry: A psychiatrist diagnoses and treats mental, emotional, and behavioral disorders.

Radiology and Nuclear Medicine: A radiologist uses radioactive materials to diagnose and treat disease.

Thoracic Surgery: A thoracic surgeon uses surgery to diagnose or treat diseases of the chest.

Urology: A urologist diagnoses and treats diseases of the urinary tract.

Clinics

The administrative medical assistant may be employed by a clinic. A clinic may specialize in the diagnosis and treatment of a specific disorder—back pain, headache, mental health, or wound treatment, for example—and is considered an outpatient setting. Many clinics have a number of specialties within one building. The specialties may be related, so that the patient moves from department to department for extensive examination and specialty consultations.

Hospitals and Medical Centers

Hospitals and the large physical complexes that make up medical centers employ many administrative support personnel, particularly those skilled in specific medical office management tasks. Assistants may work in the admissions department in several areas of a hospital or medical center—the main admitting office, where patients are received for a stay in the hospital; admissions to the emergency room; or admissions for patients in same-day surgery clinics. Departments such as patient education, insurance, billing, social services, and medical records also need skilled and knowledgeable assistants. Career opportunities for assistants in these facilities will continue to grow along with the technological advances in diagnosis and treatment and the size of the aging population.

Care Facilities

There are many facilities specializing in the short-term care of patients recovering after hospital stays. There are also patients who enter rehabilitation centers to improve the functioning of their back, arms, legs, hips, or hands. Other facilities provide long-term care for patients with chronic mental or physical illnesses. All of these facilities rely on skilled personnel who understand patients and their care.

Insurance Companies

The healthcare industry is subject to great pressure because of high health costs and the reality that people are living longer and often require greater care as they age. Insurance companies and government health insurance programs must ensure that claims from healthcare providers are “clean claims”—in other words, the claim forms are correct and complete. They employ administrative medical assistants who are skilled in handling medical documents and understand medical procedures. Assistants may work for the following:

- Large insurance companies specializing in healthcare, such as Blue Cross Blue Shield and CIGNA
- Government-sponsored programs, such as Medicare, Medicaid, and Tricare
- Other insurers, some of which are sponsored by clubs, unions, and employee associations
- Managed care organizations

All areas of employment have complex needs and require the handling of tasks such as completing and checking reports received from doctors, coding diagnoses and procedures, adjusting claims, sending payments of claims, and renewing contracts.

1.4 WORK ETHIC AND PROFESSIONALISM

Positive personality traits are developed into habits and skills that help the administrative medical assistant deal effectively with tasks and people. These habits and skills, which form a **work ethic**, greatly enhance employees' value in any medical work setting.

Work Ethic

Employers responding to research surveys about employees rank certain habits and skills the highest. These habits and skills make the employee valuable to the practice. They are also often predictors of success in a medical office setting.

For centuries, work ethics, the outward display of an employee's values and standards, has been one of the foundation stones of business. Businesses have either been successful or failed as a direct result of employees' work ethics. We will discuss several areas in which employees outwardly display work ethic.

Accuracy. Because even a minor error may have major consequences for a patient's health, physicians rank **accuracy** as the most important employee trait. Although physicians may give exact instructions, they may not oversee tasks to completion. The physician counts on the assistant to perform tasks with complete correctness, including constant attention to detail.

Thoroughness. The careful and complete attention to detail required for accuracy is known as **thoroughness**. The thorough assistant produces work that is neat, accurate, and complete. This trait involves

- Listening attentively.
- Taking ample notes.
- Paying attention to details, such as who, what, when, why, where, and how.
- Verifying information.
- Following through on details without having to be reminded.

The physician and other team members should be able to depend on the assistant to accomplish any task in a complete, accurate, and timely manner.

Dependability. The administrative medical assistant who finishes work on schedule, does required tasks without complaint (even when they are unpleasant), and always communicates willingness to help is said to be a dependable employee. **Dependability** is closely related to accuracy and thoroughness. The dependable assistant

- Asks questions and repeats instructions to avoid mistakes.
- Asks for assistance with unfamiliar tasks.
- Enters all data, such as insurance claim information and lab values, carefully.
- Takes clear and complete messages.

Others can depend on the assistant to accomplish tasks effectively and as efficiently as possible. When an emergency situation occurs and the AMA must miss work, contact the designated staff member, such as the office manager, immediately so tasks and responsibilities can be completed on time.

HIPAA TIPS

Patient confidentiality is an important part of Health Insurance Portability and Accountability Act (HIPAA) compliancy. Never discuss confidential patient information when using a speaker phone feature. Unauthorized parties may be able to overhear the conversation. It is important and courteous to advise speakers that they are being broadcast and to advise them of all other listeners in the room. If there is a possibility of being overheard by patients or visitors, the speaker phone should not be used. The voice should be kept sufficiently low even when not using a speaker phone.

You are responsible for making patient callbacks prior to leaving for the afternoon. The other medical office professional is absent, so you are also responsible for prepping charts for the next day's appointments. Using the speaker option on the telephone means that you can do other things at the same time, such as charting in patients' files. If you decide to use this option, what would you say to the patient on the phone to advise him or her that you are on speaker phone?



Figure 1.3

The administrative medical assistant shown here is completing an insurance claim form. *How can assistants ensure accuracy in their work?*

Efficiency. Effective individuals accomplish tasks, but efficiency has higher value in the work environment than effectiveness alone. Using time and other resources to avoid waste and unnecessary effort when completing tasks is the defining mark of **efficiency**. An example of an efficient administrative medical assistant is one who plans the day's work in advance, makes a schedule for completion, and assembles the materials and resources necessary to complete the tasks. Efficiency also includes the organizational ability to divide large, complex tasks into smaller, more manageable components. Rearranging resources to complete tasks efficiently may require change. Flexibility is a key component when working within a medical office environment.

Flexibility. The ability to adapt, to change gears quickly, and to respond to changing situations, interruptions, and delays is **flexibility**. The flexible assistant is able to respond calmly to last-minute assignments to meet deadlines under pressure, and to handle several tasks at once. The ability to grasp new situations and new concepts quickly is an important aspect of flexibility. Being able to implement new ideas and good suggestions with self-confidence is a mark of flexibility.

The medical office is a changing environment. The introduction of computer technology and implementation of the Health Insurance Portability and Accountability Act (HIPAA) require extreme flexibility by all medical office team members. Government-mandated implementation of electronic health records and a new coding system (ICD-10) are quickly approaching as the next new horizon of change. Flexibility and good judgment will be key contributors to a smooth transition.

Good Judgment. The quality of **good judgment** involves the ability to use knowledge, experience, and logic to assess all the aspects of a situation in order to reach a sound decision. Frequently, good judgment is expressed by the administrative medical assistant who knows when to make a statement and when to withhold one. For example, choosing the right time and right words when making a suggestion to an employer or to other staff members shows good judgment. It may also be good judgment to decide that the suggestion should not be made because, based on your objective and honest evaluation of past experience, the suggestion will not be accepted.

Honesty. Telling the truth is **honesty**. It is expressed in words and actions. It is the quality that enables the physician to trust the administrative medical assistant at all times. The trustworthy assistant understands the serious nature of the physician's work and the confidential nature of the patient's dealings with the physician. The assistant can be trusted not to reveal any of a patient's data, any conversations, or any details, which must always remain confidential. Honesty is central to the integrity that allows the assistant to effectively represent the profession. Finally, the honest assistant demonstrates initiative by quickly reporting mistakes without attempting to cover them up or blame others.

Initiative. To take action independently is to show **initiative**. The administrative medical assistant works with certain routine administrative activities every day. Dealing with these often requires the assistant to take action without receiving specific instructions from the physician. The assistant's ability to move work forward and to resolve issues by using initiative is a valuable skill in a busy office.

Initiative also involves making unsolicited offers of help that mark a valued employee, one who goes beyond the job's regular responsibilities. For example, offering to stay late to help the physician or coworkers finish extra work is always appreciated. To give patients additional help, you may offer to call for a taxi after an appointment, obtain a wheelchair when needed, write out instructions, or send a reminder card before the next appointment. Medical office assistants who demonstrate initiative also have critical-thinking skills and problem-solving abilities.

Problem-Solving Ability. **Problem-solving** involves logically planning the steps needed to accomplish a job. Asking for advice when appropriate and acting wisely also demonstrate the ability to solve problems effectively. The administrative medical assistant who is adept at solving problems also has a basic understanding of the goals and requirements of the work environment. Critical-thinking skills and problem-solving skills work together to establish steps and reach solutions. Just as problem-solving involves logically planning steps, the assistant who uses critical-thinking skills looks at all possible resources to build the steps. Critical thinkers use past experiences and present resources and knowledge to form future solutions. In other words, they think "in and outside their box." Brainstorming, listing all possible ideas, with others allows the assistant to gather information that otherwise may not have been considered. Being able to produce solutions in a timely manner should be one of the goals of a problem-solving team.

Punctuality. Being on time—**punctuality**—is important for the administrative medical assistant because of the physician's schedule and the need to complete routine duties before patients arrive. A medical office is often open for the staff a half hour before patient appointments. This is not a time for employees to use in getting from home to work. It is a time for planning the day's work, organizing tasks, and greeting patients who arrive before the start of business hours. It is common for an answering service to continue answering calls during this time to allow the assistant and other team members time to prepare. Given enough time, the self-motivated employee may prepare the next day's tasks prior to leaving at the end of the work shift.

Self-Motivation. The quality of **self-motivation** is expressed by a willingness to learn new duties or procedures without a requirement to do so. The administrative medical assistant who helps with work that needs to be done and learns new aspects of job responsibilities is self-motivated. Alertness is an aspect of self-motivation. This alertness enables the assistant to see and undertake jobs that need to be done and to anticipate the patient's and the physician's needs. A mix of self-motivation and tact should be used when seeking areas to assist fellow team members.

Tact. The ability to speak and act considerately, especially in difficult situations, is known as **tact**. Working with people in ways that show you are sensitive to their possible reactions helps you achieve the purpose at hand smoothly and without giving offense. Tactful manners and speech create goodwill with patients and other members of the medical office team.

Being a Member of the Team. Those who have the positive attitude of a **team player** are generous with their time, helping other staff members when necessary. A good team player observes stated office policies and quickly learns the unwritten rules of office life, such as

- When it is acceptable to sit at another employee's desk
- Whether it is acceptable to eat or drink at your desk
- How to time a break and determine how long it should be
- When and in what manner it is acceptable to converse with coworkers

Being a good team player also involves the simple courtesies: avoiding personal activities, phone calls, and text messaging; knocking before entering an office, even if the door is open; being careful about sharing details of your personal life in ordinary polite conversation; and avoiding the use of profanity and coarse language. Team players, moreover, are always careful to observe confidentiality by not discussing patients or commenting in any way about them or any other staff members.

Working outside the traditional office environment, such as processing medical insurance claims from home, still requires the staff member to work as part of and consider the needs of the medical office team. Missing a deadline or keeping materials longer than anticipated can cause a ripple effect. Aggressive behavior within a team promotes ill feelings and a lack of cooperation; however, professionally assertive behavior among those working together as a team can promote positive attitudes toward daily responsibilities and a willingness to cooperate to accomplish goals.

Assertiveness. **Assertiveness** is the ability to step forward to make a point in a confident, positive manner. In some ways, assertiveness is the result of having acquired many of the habits, attitudes, and skills discussed here. Administrative medical assistants who are accurate, dependable, and honest, who understand and perform tasks with intelligence and good judgment, are confident employees. They are able to step forward and contribute to a more efficient, more cordial work environment. Assertiveness is always a positive force. It is unlike aggressiveness, which is a hostile and overbearing attitude. Assertiveness assumes that the assistant not only is competent but also has established cordial and cooperative working relationships.

Professional Image

Few professions are as much respected as the medical profession. It has an image of health, cleanliness, and wholesomeness. If you choose to work in a healthcare setting, your appearance and bearing must reflect this image. Patients expect your positive personality and pleasing manner to be reflected in your appearance through healthful habits, good grooming, and appropriate dress.

Being in style, as advertisements and magazines define style, is not the same thing as projecting a **professional image**. Style is about reflecting a personal vision of who you are in the way you act, dress, and groom, such as hairstyle and nail care. In the workplace, however, you reflect not your own personal vision but the employer's preferences about how the practice should be seen by patients and the community.

Physical Attributes. Good health is the result of maintaining good posture, eating a properly balanced diet, getting sufficient rest, and exercising regularly. These good health



Figure 1.4

The administrative medical assistant projects a professional image. *What habits, grooming, and dress styles show professionalism?*

habits show in the energy of your body when you move, walk, or communicate; in the healthful glow of your skin; in the alertness and clarity of your eyes; and even in the shine of your hair and the health of your nails.

Habits that promote good health are essential to maintaining a professional image. These good health habits are complemented by good grooming habits. Although cleanliness is the basis of good grooming, grooming means more than cleanliness. A daily bath or shower, the use of deodorant, regular dental care along with daily dental brushing and flossing, and a neat overall appearance are all elements of good grooming. Also included in good grooming habits are the following:

- Nails should be manicured, so that the hands look cared for. Employees should avoid bright or unusual nail polish colors and stenciled nails. Nails should not be so long that they pose a threat to others or interfere with working at the keyboard. Office policy on artificial nails should be followed.
- Hair requires frequent shampooing and should be arranged in a conservative style that will not require a great deal of attention during working hours.
- The patient and assistant should be able to look at each other eye to eye; therefore, hair should not cover the eyes or interfere with sight.
- Male employees should shave daily or have neatly trimmed facial hair.
- Perfumes or colognes should be avoided in the office. Staff members and patients may be irritated by fragrances, especially those with a floral base. Lotions should also be unscented.
- Makeup should be used moderately and should complement the assistant's skin type and color.
- Clothes must always be freshly laundered and pressed. If you are required to wear a white uniform, it must be kept *snow* white and should never be worn over dark underclothes. If street clothes are worn in the office, they should be simple and should fit well. Tight or revealing clothes are not appropriate.
- Shoes should be comfortable and in good repair.

- Jewelry and hair ornaments are not good accompaniments to uniforms. Jewelry that is worn with street clothes in the office should be small and unobtrusive. Large bangles and bracelets with dangling parts are often noisy and get in the way of work.
- Most professional work environments have a stated policy concerning the amount and type of jewelry that may be worn—for example, one ring per hand (engagement ring/wedding band is considered one). Piercings and tatoos are common in today's society and office policy will state what may be worn and/or shown. Common policies state that no more than two earrings per ear are permitted and that no other piercings may have jewelry, such as tongue, nose, eyebrow, or lip. Tatoos should be covered.

Maturity. Many administrative and personal skills contribute to the achievement of **maturity**. And maturity *is* an achievement. It takes great determination to acquire and practice the attitudes, habits, and skills that contribute to maturity.

Emotional and psychological maturity is not dependent on age. It is made up of many aspects of personality and of many skills. The mature person is able to work with supervisors and under pressure, even in unpleasant or frustrating conditions. The mature person sees a job through and gives more than is asked. Maturity enables a person to gather and use information to make good decisions. Maturity is reflected by independence of judgment as well as by ambition and determination. As maturity becomes evident in the administrative medical assistant, it inspires the confidence of managers, patients, and coworkers.

1.5 PROFESSIONAL GROWTH AND CERTIFICATION

When an employee stops being willing to learn, he or she stops growing professionally and becomes less valuable to their employers and other colleagues. Learning and growing in the field allow the administrative medical assistant to become more successful and to enjoy an enviable professional status. Once assistants have completed specific requirements, they are eligible to join several national associations. By passing examinations, medical assistants may become certified. **Certification** is the indication given by certain associations that a person has met high standards and has achieved competency in the knowledge and tasks required. Through continuing education, seminars, conferences, and meetings with other professionals in the field, these organizations provide opportunities to grow as office professionals and to advance in a chosen career.

AAMA. The American Association of Medical Assistants (**AAMA**) is a major nationwide organization. The AAMA recommends to the Commission on Accreditation for Allied Health Education Programs (CAAHEP) those formal education programs that have met AAMA curriculum standards. Further, the AAMA sponsors the national certification examination for medical assistants in three areas: general, administrative, and clinical. As stated earlier in the chapter, specifics within each of the three areas are outlined at the AAMA Web site (<http://www.aama-ntl.org>). Those who pass the examination are certified and receive the designation of Certified Medical Assistant (CMA).

The AAMA requires CMAs to be recertified every five years. This practice ensures that medical assistants keep up with developments in the field. There are hundreds of continuing education courses sponsored by the AAMA to help assistants keep current and become recertified.

Although medical assistants need not be certified to be employed as assistants, certification improves the chances of career advancement and provides motivation for continued professional growth.

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International Association of Administrative Professionals

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AMT. The American Medical Technologists (AMT) is another nationwide organization offering certification for medical assistants. Successful completion of this examination earns the credential of Registered Medical Assistant (RMA). A certification exam to become a Certified Medical Administrative Specialist (CMAS) is also offered through AMT.

AHDI. The Association for Healthcare Documentation Integrity (AHDI), formerly known as the American Association of Medical Transcription (AAMT), is a nationwide organization that promotes professional standards and growth for those who have a special interest in transcription and wish to be certified. AHDI offers the Certified Medical Transcriptionist (CMT) certification exam. It is recommended that individuals wishing to take this exam have at least two years of transcription experience in acute care transcribing. Also offered by the AHDI is the Registered Medical Transcriptionist (RMT) exam. Individuals with less than two years of transcription experience (such as a recent graduate) may sit for this exam. Part One consists of multiple-choice questions from six content areas: medical terminology, English language and usage, anatomy and physiology, disease process, healthcare records, and professional development. Part Two is a medical transcription work simulation.

Even with the use of voice-recognition technology, medical transcriptionists will continue to be in demand. The technology cannot yet handle all the nuances of English. The transcriptionist's skill in English usage, grammar, and style ensures the competent editing and correction of materials. Taking advantage of certification and opportunities for continued study in this field, as in medical assisting, helps in career advancement.

IAAP. The International Association of Administrative Professionals (IAAP), previously known as Professional Secretaries International (PSI), is a worldwide nonprofit organization working with career-minded administrative professionals to promote excellence through education, community building, and leadership development. Core values of IAAP include integrity, respect, adaptability, communication, and commitment. This organization sponsors two comprehensive examinations—the Certified Professional Secretary (CPS) and the Certified Administrative Professional (CAP). Individuals successfully completing the CPS demonstrate competence in office technology, office systems and administration, and management. Those passing the CAP demonstrate competence in the three areas of the CPS exam plus one additional area, advanced organizational management. The organization, which maintains chapters all over the country, makes professional contacts easy. The IAAP provides study materials and information about available review courses.

There are companies that offer salary incentives to those who become certified secretaries. In this area, as in all other areas of most professions, certification improves the chances for advancement.

AAPC and AHIMA. The American Academy of Professional Coders (AAPC) and the American Health Information Management Association offer certification in areas related to coding health information management. AAPC offers the credentials of Certified Professional Coder (CPC), Certified Professional Coder-Outpatient Hospital (CPC-H), Certified Professional Coder-Payer (CPC-P), and Certified Interventional Radiology Cardiovascular Coder (CIRCC). Credential exams are also available in many speciality areas, such as dermatology.

AHIMA offers three certifying exams in coding—CCA (Certified Coding Association), CCS (Certified Coding Specialist), and CCS-P (Certified Coding Specialist-Physician Based). Four exams are offered to allow individuals to demonstrate their competency in areas dealing with health information and the medical records. RHIT (Registered Health Information Technician) and RHIA (Registered Health Information Administrator) both deal exclusively with the the quality of medical records. Knowledge of medical,

administrative, ethical, and legal requirements as they pertain to medical record information is required. Applicants will also be asked to demonstrate their competence in computer information systems.



1.6 INTERPERSONAL RELATIONSHIPS

The administrative medical assistant is usually the first person the patient comes into contact with when making an appointment or going to the doctor's office. The way in which the assistant receives and welcomes the patient, whether by phone or physically in the office, establishes the tone of the visit, the professionalism of the office, and the patient's feelings about the doctor and the treatment.

The responsibility to make patients feel that they are important and that enough time is available to them for treatment is of major concern for the medical assistant. Although the office may be busy, and both the doctor and the patients may want to speak to the assistant at the same time, the assistant must remain calm, reassuring, and pleasant to everyone.

Taking Care of Patients

Greeting a patient by name, if possible, contributes to making that patient feel important. If you are away from the desk when a patient arrives, acknowledge the patient with a smile and a greeting as soon as you return.

Every person is to be shown the same degree of respect and concern without regard to race, age, gender, or socioeconomic situation. Every doctor's office accepts patients who receive care for a nominal fee or even completely free. The physician's aim in all cases is the same: to make the person well in the shortest possible time. The assistant's aim in all cases is to treat all patients with the same amount of sympathy, concern, and attention.

Familiarity

A physician may choose to establish a less formal tone in the office in order to make patients feel more comfortable. Even when this is the case, the office is still a professional setting. Certain ways of expressing familiarity, either with the physician or with the patients, are not appropriate.

The doctor should always be referred to and spoken to by title and last name: "Dr. Larsen will see you now." This courtesy is observed even if the physician and administrative medical assistant are relatives or have a personal relationship. Conversation in front of patients should never indicate anything other than a professional relationship.

Patients may have preferences about the way they are addressed. It shows respect to address the patient by the appropriate title and last name: "Mr. /Mrs. /Ms. /Miss /Reverend /Lopez." If a patient wishes to be addressed in some other way, such as by a first name or nickname, that patient will invite you to do so. The assistant should make a notation of the preference for future use. Names that are difficult for the assistant should have the pronunciation noted. It is acceptable to call children by their given name.

EXAMPLE

Assistant: Mrs. Haynes, Dr. Larsen is ready to see you now.

Patient: Thank you, Linda, but please call me Margaret. I'm not used to being called Mrs. Haynes.

Social Relationships

In many offices, the policy discourages, or may even forbid, a social relationship between a patient and a staff member. Such a policy reflects the physician's belief that these relationships are not consistent with a professional atmosphere and may interfere with the proper medical management of the patient's case. Under no circumstances should you make a social engagement with a patient without first checking office policy and discussing the situation with your employer.

Conversation with Patients

If the administrative medical assistant has to spend considerable time with a patient, the patient is the one who decides whether or not to start a conversation. If the patient wishes to talk, the patient should also choose the subject. The assistant should listen and respond courteously. General subjects, such as the weather, sports, hobbies, or local events, may be ideal topics. Try to avoid controversial subjects, such as politics or religion. Keeping the conversation to general topics should also ensure that you are never in a situation where you argue with a patient or try to persuade a patient that a certain view is correct.

Because the patient identifies the administrative medical assistant with the doctor, the patient also believes that the assistant carries the doctor's authority. For this reason, the assistant should never offer a patient medical advice or comment on the patient's treatment. Very few patients have a substantial knowledge of medicine, anatomy, or physiology. They may easily misunderstand a remark made by the assistant, especially if the remark contains a technical term. If the patient seeks advice or asks a question related to treatment, the medical assistant should respond tactfully: "That is a question the doctor should answer for you. Be sure to ask about that during your examination."

Difficult Patients. The best test of interpersonal skills may be the successful handling of difficult, unreasonable, or unpleasant patients. The patient's self-control may be undermined by the pain and worry that accompany the illness. Dealing with short-tempered or irritable patients requires the medical assistant to show patience, understanding, and restraint. Calmly repeating instructions to an uncooperative patient may be difficult, but it may prevent having to ask a patient to redo a procedure or task or having to repeat the instructions later.

EXAMPLE

Assistant: Mr. Rosen, here are the instructions for the x-ray you are going to have on Monday. Let me go over them with you again to make sure you understand them and to see whether you have any questions. If you think of any questions at a later time, you may call me. I have written my name and telephone number here and will be happy to help answer your questions.

A patient who has had to wait a long time to see the doctor may become restless or impatient. In such instances, the medical assistant should make some gesture of attention. Introduce a general topic of conversation or reassure the patient that you are aware of the lateness of the schedule and thank the person for understanding.

There are times when patients become angry. A mistake in an insurance payment, a long wait to see the doctor, or even the patient's physical pain or discomfort may trigger an outburst of bad temper. The medical assistant must remain calm and courteous. A gentle tone and soothing voice sometimes help calm a patient. Separate facts from feelings and never argue. Politely offer to help correct a situation in any way you can. The offer by itself may help eliminate the patient's anger.



Figure 1.5

The administrative medical assistant ensures that patients leave the office with a feeling of goodwill. *What actions and attitudes cause patients to feel positive about their office visits?*

Every patient should leave the doctor's office with a feeling of goodwill. Frequently, the medical assistant will have an opportunity to talk to the patient as the patient prepares to leave the office. Calling the patient by name, if possible, and extending a pleasant good-bye will have beneficial results. A patient who leaves the office on a positive note may tell others about a good experience with the staff.

Terminally Ill Patients. If a patient whom you know to be terminally ill engages you in conversation, be sensitive to the situation by avoiding certain questions that you might ordinarily ask, such as "How are you?" Try to keep the conversation short and general. Terminally ill patients usually are willing and eager to discuss topics such as children and/or grandchildren, spouses/partners, or other individuals of whom they are proud. Many patients have hobbies, such as gardening or music, about which they are excited to share. Select topics that are short-term in nature instead of long-term topics, such as plans for the next New Year's celebration. The bottom line is to be empathetic to the patient's condition and emotional state.

Confidentiality

Maintaining the **confidentiality**, or privacy, of patients' medical information is a legal requirement. A doctor who gives information about a patient without a patient's permission, except to another doctor, can be prosecuted under the law, and the doctor's license may be revoked. Similar legal requirements and penalties apply to employees in the doctor's office.

Patient Sign-in Log. Documentation of a patient's visit, in his or her own handwriting, is provided when the patient signs in on the log. The patient's privacy is to be protected at all times, which includes the check-in and waiting area.

Traditionally, a patient arrives at the office and signs his or her name and other pertinent information, such as arrival time, appointment time, and doctor to be seen, on a check-in or visitor's log. Leaving this information available to be viewed by others is a violation of HIPAA. Many offices still use this format; however, as soon as the patient arrives, the name is marked through with a broad, dark marker. The problem with this method is

COMPLIANCE TIP

The responsibility for confidentiality extends beyond the office environment. Neither a patient's name nor any other information should ever be mentioned outside the office. A patient may not wish to tell family members or business associates that medical care is needed. The doctor's specialty may be an indication of the disease for which the patient is being treated, and the patient may not wish this to be known.

that the written documentation of the patient's visit in his or her own handwriting has been eliminated.

Currently, one of the preferred sign-in methods is a label method. Patients arrive and place their name on a label on the sign-in log. Information about the arrival time and appointment time, as well as other generic information, are checked off by the patient. The label containing the patient's name is then removed by the administrative medical assistant and placed into the patient's chart as evidence of the patient's arrival.

Assigning numbers to patients on their arrival is another method of protecting patient confidentiality. Their number, instead of their name, is used when addressing them in the waiting area.

Sometimes patients will verbally check in on their arrival. The assistant will make a notation of their arrival on a preprinted daily schedule.

Medical Histories. Medical histories of patients contain a great deal of confidential information, not only about the patients but also about their families and perhaps other contacts, such as friends. Employees may not disclose any information about a patient's illness, personal history, or matters relating to family or others.

Confidentiality about medical records is also to be observed in any conversations the medical assistant has with the patient. It is not the medical assistant's place to share with the patient the doctor's diagnosis or prognosis. The doctor is the sole judge of what information is to be given to, or withheld from, the patient. The assistant must refuse to discuss the patient's case and should refer the patient to the doctor for information.

Many people other than the patients themselves may ask the medical assistant for information about a patient's case. There are some patients who are curious about other patients whom they may know or may have seen in the doctor's office during their own visits. There are some curious patients who may try to obtain personal information about the doctor, staff, or other patients. Friends or relatives of a patient may inquire about the doctor's opinion, the method of treatment, or the duration of the illness. A courteous but firm refusal, such as "I'm sorry, but that information is confidential," should prevent further attempts to get information.

Record Security. The medical assistant must be aware of the location of the front desk and of various work areas in relation to public spaces, such as the lobby or waiting room. Location is important in safeguarding the confidentiality of records because they may be read if left where other patients, staff members, or visitors can see them. Because patient records, schedules, and billing information are now often computerized, the locations of computer screens at the front desk and in work areas are also important. Sensitive information should not remain on the screen when you need to be away from the desk. Screen savers should be used when away from the computer area, and access to computer data should be password protected. Screens should not be able to be viewed by patients, either on their arrival or their departure. Monitor protectors that allow data to be viewed only from the front may also prevent accidental disclosure of medical information.

Hardcopy medical charts are often placed outside the exam room for the physician to review prior to entering the room. As other patients pass this area, they can see the name on the chart. This is illegal disclosure of protected medical information and a violation of HIPAA. A very simple solution is to turn the chart around, so that the name and any other medical information are not exposed.

In areas close to the waiting room or lobby, caution should also be exercised in conversations, whether over the phone or face to face. Conversations between a patient and the assistant or among employees may easily be overheard. Unless sound-proof glass is being used, simply sliding the glass window closed does not prevent information from being heard.

In general, nothing that happens in the office should be repeated at home or to friends. A patient can sometimes be identified by the circumstances of the case or by some other detail, even when the patient's name is not mentioned.

There is wisdom in the adage "What you see here, what you hear here, must remain here when you leave."

Cultural Diversity

People's beliefs, value systems, and language, as well as their understanding of the world, grow out of the culture into which they were born and in which they were raised. It is important to understand that, just as the elements of your culture are formative for you, so the cultures of others are formative for them. Although each culture is different, no one culture is superior in any way to any other culture. However, it is important to understand that people in cultures different from yours may express themselves and present themselves in a different way from what your own culture has taught you to expect. **Ethnocentrism** is the tendency to believe that one's own race or ethnic group is the most important and that some or all aspects of its culture are superior to those of other groups. This, in and of itself, can be a barrier within the office team environment and in interactions with patients. Be respectful of people of all cultures and backgrounds. This does not mean that you accept the beliefs and customs of the culture as your own, but that you are considerate of each individual's right to express individualism within cultural practices, such as dress. Never assign patients to stereotypes that are racial, ethnic, or religious.

Language Barriers. Although most aspects of other cultures do not present barriers, a great cultural barrier may occur when the patient and staff do not speak the same language. The ideal solution is to be able to speak to a family friend or relative who accompanies the patient and can act as an interpreter. If this is not possible, you may want to have several foreign language phrase books on hand in the office. Sometimes, using drawings and hand signs will help. When communicating through language barriers, maintaining the privacy and confidentiality of patients' medical health information is essential. Diversification of patient populations is increasingly common. Office personnel should examine their patients' primary communication languages and determine if there is a need for an interpreters within the medical team. A team member with English as a second language could prove to be a valuable asset, not only to the administrative team but also to the clinical team members. Not having appropriate cultural resources to meet the needs of the day's patients can create a disruption in the schedule, just as not having the appropriate medical instruments can stop the day's schedule. Following are guidelines for communicating with patients who do not speak English:

- Speak slowly and clearly.
- Do not raise your voice above an ordinary conversational tone. Speaking louder does not improve understanding.
- Use simple words, not technical terms.
- Be brief.
- Have key phrases, such as "your next appointment is" or "thank you," translated into languages used by patients within the practice. Staff members should practice the phrases and be ready to use them when needed.

Another form of language barrier may occur in the office when the assistant must communicate with patients who are deaf. Following are tips for communicating successfully with deaf patients.

- Determine the patient's preferred form of communication: signing, writing, or speech/lip reading. Make note in the patient's chart, and be prepared when the patient arrives.
- Head nodding by the patient does not necessarily means understanding. The patient may be relying on another individual to explain the details.

- Larger, quicker, more forceful motions by the deaf individual may be an expression of heightened emotions.
- Body language, especially facial expressions, of the administrative assistant are keenly observed by the patient.
- Key phrases, such as “good morning” or “your copayment today is,” should be learned and practiced by the staff member.

When the communication mode is lip reading,

- Make sure you have the patient’s complete attention prior to beginning the communication process. A simple statement such as “Are you ready to begin?” will ensure that both parties are ready to communicate.
- Maintain direct face-to-face contact with the patient at all times during the communication process.
- Clear your mouth and mouth area of all items that may be intrusive to communication, such as gum or candy.
- Provide adequate lighting in the area and ensure that no shadows will interfere with lip reading. This should be checked with another office member prior to communication with the patient.

If the patient’s mode of communication is writing, provide writing tools, such as a white board and marker or pen and paper. Many patients, both deaf and hearing, communicate faster with electronic devices. A small computer may be used to communicate between the administrative assistant and the patient. Whether the preferred mode of communication is signing, writing, or speech/lip reading, the privacy and confidentiality of the patient’s medical information must be protected.

Nonpatients

All visitors to the doctor’s office should be treated courteously. Often, a patient’s friend or relative may accompany the patient.

Visitors on business, such as pharmaceutical company sales representatives, call on the office frequently. The doctor may not wish to take time away from the patient schedule and may ask the administrative medical assistant to get information on the product, obtain samples, and keep the business cards on file. Some offices schedule a specific time each week and/or month for pharmaceutical representatives. This gives the representative an opportunity to present materials to the physician and allows the physician to devote time exclusively to the representative.

EXAMPLE

Sales representative: I’m here to see Dr. Larsen about a new antibiotic from my company.

Assistant: Dr. Larsen has scheduled the first Monday of each month from noon to 2 P.M. as the time she will see sales representatives. Shall I enter your name on the calendar for next month?

There may be other visitors who take up the doctor’s time unnecessarily, and most doctors appreciate an assistant who screens them and tells them that the doctor is not interested.



Project 1.1 Internet Research: Professional Organizations

Using the Internet, research the Web sites of the AAMA, AMT, AHDI, and IAAP. Write down the student membership requirements of each and the advantages of belonging to each.



Project 1.2 Work Ethic and Interpersonal Relationships

On WP 1 in the back section of this text-workbook, match each of the terms in Column 2 with its definition in Column 1.



<p>1.1 Describe the tasks and skills required of an administrative medical assistant. Pages 4–7</p>	<ul style="list-style-type: none"> • The administrative medical office assistant has task responsibilities in the following areas: <ul style="list-style-type: none"> — Front office procedures — Scheduling — Records management — Administrative duties — Billing and insurance • These tasks require skills in the following areas: <ul style="list-style-type: none"> — Communication — Mathematics — Organization — Computers — Interpersonal relationships
<p>1.2 List and define at least three personal attributes essential for an administrative medical assistant. Pages 7–9</p>	<ul style="list-style-type: none"> • Personal attributes needed for the successful administrative medical assistant are equally as important as required tasks and skills. Among the personal attributes needed are <ul style="list-style-type: none"> — Genuine liking for people: enjoying people and having a desire to help them. — Cheerfulness: the ability to be pleasant and friendly. — Empathy: sensitivity to the feelings and situations of other people.
<p>1.3 Describe the employment opportunities in various medical settings and specialties and nonmedical settings. Pages 9–11</p>	<ul style="list-style-type: none"> • Employment opportunities for administrative medical assistants are increasing in physician practices (single and multi-physician practices), clinics, hospitals and medical centers, care facilities, and insurance companies. Other opportunities are increasing in the field of education and accounting firms.
<p>1.4 Identify and define positive work attitudes that contribute to the work ethic and professionalism of an administrative medical assistant. Pages 11–17</p>	<ul style="list-style-type: none"> • Habits and skills that make up the work ethic of an administrative medical assistant include <ul style="list-style-type: none"> — Accuracy: the ability to be correct, clear, and thorough. — Thoroughness: the ability to apply careful and complete attention to detail. — Dependability: the ability to be relied upon to fulfill instructions and to complete tasks on time.

- Efficiency: the ability to use time and other resources in such a way as to avoid wasted efforts.
- Flexibility: the ability to respond quickly to changed situations, last-minute assignments, and delays; the willingness to accept and implement new ideas.
- Good judgment: the ability to use knowledge, experience, and logic to assess all the aspects of a situation in order to reach a sound decision.
- Honesty: the ability to always tell the truth and to quickly assume responsibility for mistakes.
- Initiative: the ability to take action independently.
- Problem-solving: the ability to use logic to plan needed steps to accomplish a goal.
- Punctuality: the ability to be on time.
- Self-motivation: the ability to express a willingness to learn new duties and/or procedures without a requirement to do so.
- Tact: the ability to speak and act considerately, especially in difficult situations.
- Team membership: the ability to work positively with others, to be generous with his or her time, to assist others, to be courteous, and to observe rules of confidentiality.
- Assertiveness: the ability to step forward to make a point in a confident, positive manner.
- The professional image of the administrative medical assistant is that of a friendly, capable professional who inspires confidence. From the assistant's manner, speech, posture, and appearance, patients and others have the impression of someone who is mature and dedicated to competent service.

<p>1.5 List three advantages of professional affiliation and certification. Pages 17–19</p>	<ul style="list-style-type: none"> • Certification <ul style="list-style-type: none"> — Often favorably influences an employer's opinion. — Contributes to career advancement. — Fosters professional growth by the need to be recertified, continuing education programs, seminars, webinars, conferences, and the opportunity to network with others in the same profession.
<p>1.6 Apply elements of good interpersonal communications to relationships with patients and others in the medical environment. Pages 19–24</p>	<ul style="list-style-type: none"> • Administrative medical assistants should treat patients, physicians, colleagues, and others with courtesy, always maintaining a calm, pleasant, reassuring manner. • They should refrain from revealing confidential information and they have a professional relationship with the physician(s), colleagues, patients, and visitors in the office. • Medical team members need to create an atmosphere of interest in others by using positive nonverbal communications—body language, facial expressions, eye contact, etc.

Self-Awareness

Do you ever find time to think about who you are, your strengths and weaknesses, or your personality? What about your habits and values? Many people are not inclined to spend much time on self-reflection; consequently, many of us have a pretty low level of self-awareness. This is unfortunate because self-awareness can improve, and it can help us identify opportunities for professional development and personal growth.

Describe your level of self-awareness. What do you think needs to be changed in your life to improve your self-awareness?

Self-Confidence

Self-confidence is extremely important in almost every aspect of our lives. People who lack self-confidence can find it difficult to become successful. Self-confident people have qualities that everyone admires, and they inspire confidence in others. Gaining the confidence of others is one way in which a self-confident person finds success. The good news is that self-confidence can be learned and built on. **How can you work to build up your level of self-confidence? Why is self-confidence so important to success?**

Multicultural Sensitivity

Learning about others; laughing with them about some of the things they were taught as kids; celebrating similarities while accepting differences—when we have lots of resources, people seem more generous and accepting. Race and ethnicity are difficult subjects to discuss, but culture can be joked about, discussed, and embraced. **How can you promote multicultural sensitivity?**

USING TERMINOLOGY

Match the term or phrase on the left with the correct answer on the right.

- | | |
|-----------------------------------|---|
| _____ 1. (LO 1.2) Empathy | a. Completing tasks with correctness and attention to detail |
| _____ 2. (LO 1.6) Ethnocentrism | b. A trait that results in complete, neat, and correct tasks |
| _____ 3. (LO 1.4) Thoroughness | c. Sensitivity to other people's feelings and situations |
| _____ 4. (LO 1.5) AHDI | d. A trait characterized by working independently and offering to help others |
| _____ 5. (LO 1.5) Certification | e. Recognition given by associations that an individual has met high standards and has demonstrated competency in given knowledge and tasks |
| _____ 6. (LO 1.4) Accuracy | f. Provides certification opportunities for medical transcriptionists |
| _____ 7. (LO 1.4) Problem-solving | g. Believing that one's own race, ethnic group, and/or culture is superior to all other groups |
| _____ 8. (LO 1.4) Initiative | h. The ability to speak and act considerately in various situations |
| _____ 9. (LO 1.4) Dependability | i. Logically and systematically planning steps to accomplish a task |
| _____ 10. (LO 1.4) Tact | j. Finishing tasks on schedule, without complaining, and offering to assist others |

CHECK YOUR UNDERSTANDING

Select the most correct answer.

1. (LO 1.6) Nenna worked as an administrative medical assistant but was dismissed from her AMA position after numerous patients complained about how they were greeted. Nenna claims she always used an appropriate verbal greeting with each patient. Which of the following may have contributed to the miscommunication between Nenna and the patients?
 - a. Lack of professional certification
 - b. Not enough reading material in the waiting area
 - c. Nonverbal facial expressions and tone of voice
 - d. An unclean uniform

2. (LO 1.4) During his first six months at a local medical clinic, Aaron completed and submitted insurance claims to various carriers. He used a software program to check and process his claims prior to submitting them for payment. This demonstrated that he accurately completed claims using very few resources. Which of the following was he demonstrating?
 - a. Tact
 - b. Ethnocentrism
 - c. Assertiveness
 - d. Efficiency
3. (LO 1.5) While searching online for a medical coding position, Maria noticed that several opportunities required CCS-P, CPC, or other current coding credentials. Which of the following key words or phrases could she use to search for their meaning on the Internet?
 - a. Certification
 - b. Interpersonal relationship skills
 - c. Computer skills
 - d. Records management skills
4. (LO 1.3) Addison would like to work in a medical-related administrative field but is not interested in a medical office setting. Which of the following may offer the best choice of a career for Addison?
 - a. Food management
 - b. Education
 - c. Home health sales
 - d. Both b and c are correct.
5. (LO 1.1) During her interview, Ashley stated she has worked within the physical medical office setting and from the home setting using electronic health records and insurance claim processing programs. Her records show she received high evaluations and was frequently given more administrative authority. She had demonstrated competence in
 - a. Communication skills within the team environment.
 - b. Organizational skills.
 - c. Computer skills.
 - d. All of the above are correct.
6. (LO 1.2) After he finishes his shift at the Flatwoods Medical Clinic for Burned Children, Andrew volunteers his time with the local equestrian program for physically challenged children. Which of the following personal attributes is Andrew demonstrating most clearly?
 - a. Dependability
 - b. True and genuine liking of other individuals
 - c. Resourcefulness
 - d. Cheerfulness
7. (LO 1.4) An AMA should always be aware of the impression and professional image given by his or her actions and presentation because
 - a. The physician and practice are represented through the AMA.
 - b. It is part of the job description.
 - c. It may lead to an increase in salary or wages.
 - d. None of the above are correct.

THINKING IT THROUGH

These questions cover the most important points in this chapter. Using your critical-thinking skills, play the role of an administrative medical assistant as you answer each question. Be prepared to present your responses in class.

1. What qualities and skills are needed by the assistant who is responsible for the front desk? Why are these critical skills?
2. How can imagining yourself in someone else's situation help you develop empathy for patients?
3. Do you think that assistants working in various medical settings have the same type of assignments? Might some employers assign assistants a single task or related tasks, such as processing insurance claims, while in other settings the assistant is likely to perform a variety of tasks?
4. Why is it important to be a team player in the office?
5. What qualities project a professional image in an administrative medical assistant?
6. An assistant is asked by another employee why the assistant decided to meet the requirements to become certified. What might the assistant answer?
7. How should an assistant communicate with non-English-speaking patients and with patients who are visually and/or hearing impaired?

