

## Component II: Administrative

### Module E: Medical Office Management

#### Topic 2: Facility Management

##### Statement of Purpose

To prepare the learner with basic knowledge and skills necessary to participate in facility management.

##### Student Learning Outcomes

Upon completion of this topic, the learner will be able to:

1. Spell and define key terms.
2. Identify types of reference manuals in a medical office.
3. Discuss equipment leases and contracts.
4. List the importance of intra-office communication.
5. Discuss the role of the employer and employee to provide a safe working environment.
6. Name components in making travel arrangements.
7. Demonstrate methods to avoid job burnout and reduce stress.
8. Explain the legal implications of hiring, terminating and disciplining employees.

##### Terminology

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| 1. Americans with Disabilities Act (ADA)                        | 16. Maintenance contract                                 |
| 2. Bio-hazardous waste container                                | 17. Material Safety Data Sheets (MSDS)                   |
| 3. Chain of command   | 18. Office policy manual                                 |
| 4. Clinical Laboratory Improvement Amendments (CLIA)            | 19. Office procedure manual                              |
| 5. Coping mechanisms  | 20. Occupational Safety and Health Administration (OSHA) |
| 6. Disciplinary action  | 21. Packing slip   |
| 7. Employee handbook  | 22. Quality assurance                                    |
| 8. Evaluation   | 23. Relaxation techniques                                |
| 9. Grievance procedure  | 24. Risk Management                                      |
| 10. Health Insurance Portability and Accountability Act (HIPAA) | 25. Service contract                                     |
| 11. Incident report   | 26. Sharps container                                     |
| 12. Inventory control   | 27. Staff meeting  |
| 13. Invoice   | 28. Stress   |
| 14. Job burnout   | 29. Team work  |
| 15. Lease   | 30. Termination  |
|   | 31. Warranty   |

##### References

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4. Blesi, M., Wise, B.A., & Kelley-Arney, C, (2012) *Medical Assisting Administrative and Clinical Competencies (7<sup>th</sup> Ed.)* Clifton Park, NY: Delmar, Cengage Learning.

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6. Proctor, D. B., & Young-Adams, A. P. (2011). *Kinn's The Medical Assistant: An Applied Learning Approach* (11<sup>th</sup> Ed.). Philadelphia, PA: Saunders Elsevier.
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Content Outline/Theory Objectives	Suggested Learning Activities
<p><b>Objective 1</b>  <b>Spell and define key terms.</b></p> <ul style="list-style-type: none"> <li>A. Review the terms listed in the terminology section.</li> <li>B. Spell the listed terms accurately.</li> <li>C. Pronounce the terms correctly.</li> <li>D. Use the terms in their proper context.</li> </ul>	<ul style="list-style-type: none"> <li>A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman and concentration.</li> <li>B. Administer vocabulary pre-test and post-test.</li> <li>C. Discuss learning gaps and plan for applying vocabulary.</li> </ul>
<p><b>Objective 2</b>  <b>Identify types of reference manuals in a medical office.</b></p> <ul style="list-style-type: none"> <li>A. Office policy manual may also be known as an information or employee manual. It contains rules or guidelines that dictate day-to-day functions of the office or facility. <ul style="list-style-type: none"> <li>1. Clarifies what is expected of each employee.</li> <li>2. Clarifies what employees can expect of the medical office or facility.</li> <li>3. Contains a mission statement.</li> <li>4. Organization chart of office staff is presented.</li> <li>5. Employee contract of understanding <ul style="list-style-type: none"> <li>a. Signed statement that contents have been read and employee will observe stated polices.</li> <li>b. Retained in employee's employment file.</li> </ul> </li> <li>6. Contains polices of office or facility <ul style="list-style-type: none"> <li>a. Vacation and time off.</li> <li>b. Disciplinary action guidelines.</li> <li>c. Evaluations and pay increases.</li> <li>d. Dress code.</li> <li>e. Benefits.</li> <li>f. Attendance.</li> <li>g. Job description.</li> <li>h. Safety <ul style="list-style-type: none"> <li>1) Biohazardous areas.</li> <li>2) Sharps container.</li> <li>3) Break and eating areas.</li> <li>4) Tips for preventing injuries such as body mechanics.</li> <li>5) Infectious material and hazardous waste.</li> <li>6) OSHA regulations.</li> <li>7) HIPAA Regulations acknowledgment.</li> </ul> </li> </ul> </li> <li>7. Manuals are updated and the written changes are distributed to employees.</li> </ul> </li> <li>B. Office procedures manual</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students compile a variety of Material Safety Data Sheets (MSDS) from different sources such as local physicians' office and compile a classroom manual.</li> <li>D. Students may be assigned a mentor to help assist in the gathering of information.</li> <li>E. Have student's list items they would want in an office employee policy manual as a new hire.</li> </ul>

<ol style="list-style-type: none"> <li>1. Provides detailed information relative to the performance of tasks in the office.</li> <li>2. Serves as a guideline for training tasks.</li> <li>3. Useful for evaluation of employee performance.</li> <li>4. May have different manual for administrative and clinical job descriptions.</li> </ol> <p>C. Material Safety Data Sheets (MSDS) manual contains information about hazardous chemicals and other substances</p> <ol style="list-style-type: none"> <li>1. Substance names.</li> <li>2. Chemical names.</li> <li>3. Common names.</li> <li>4. Chemical characteristics.</li> <li>5. Physical hazards.</li> <li>6. Health hazards.</li> <li>7. Guidelines for safe handling and storage.</li> <li>8. Emergency and first aid procedures.</li> <li>9. May be in the form of a hazard label, which is an abbreviated version permanently affixed to the specific container.</li> </ol> <p>D. Operator and equipment manuals should be stored with the equipment.</p> <p>E. Communication manual may contain minutes from staff meetings or interoffice memos. Employers may ask employees to initial all correspondence.</p>	
<p><b>Objective 3</b>  <b>Discuss equipment leases and contracts.</b></p> <ol style="list-style-type: none"> <li>A. Used to “purchase” equipment over time.</li> <li>B. Leases are contracts for the use of equipment.</li> <li>C. Leases last for a specified time period (1-5 years) and require monthly payments and an initial fee.</li> <li>D. Lease may allow for purchase at end of contract.</li> <li>E. Advantages <ol style="list-style-type: none"> <li>1. Money not spent on purchase can earn interest at bank or be used elsewhere.</li> <li>2. Allows equipment to be updated more frequently and to obtain more advanced technology.</li> </ol> </li> <li>F. Maintenance and service contracts on equipment <ol style="list-style-type: none"> <li>1. Maintenance must be done on a regular basis by manufacturer or office protocol.</li> <li>2. Equipment suppliers offer maintenance contracts that specify when equipment will be cleaned, repaired, services and checked for worn parts.</li> <li>3. Service contract covers services not covered by a maintenance contract such as emergency repairs.</li> </ol> </li> <li>G. A warranty is a statement issued by the manufacturer that states equipment is guaranteed to be operational under normal usage. <ol style="list-style-type: none"> <li>1. Mail in card.</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students work in groups to compile an inventory of classroom supplies.</li> <li>D. Have students make a list of equipment under warranty and procedures for recording dates, conditions and contact information.</li> </ol>

<p>2. May be part of a service contract.</p> <p>H. Inventory control of equipment and supplies</p> <ol style="list-style-type: none"> <li>1. Usually delegated to those that use the equipment or supplies.</li> <li>2. Maintain ample stock for ongoing needs.</li> <li>3. Maintain use of a current catalog of supplies.</li> <li>4. Computerized system has templates for data entry.</li> <li>5. Manual system       <ol style="list-style-type: none"> <li>a. Name of item.</li> <li>b. Catalog number.</li> <li>c. Supplier's or manufacturer's name, address and phone number of contact person.</li> <li>d. Quantity ordered.</li> <li>e. Cost of item.</li> <li>f. Date order placed and date order received.</li> <li>g. Specific size.</li> <li>h. Last date of order.</li> <li>i. Initials of person placing order.</li> </ol> </li> <li>6. Flag system is the use of colored clips to indicate status of ordered equipment or supplies.</li> <li>7. Ordering supplies or equipment       <ol style="list-style-type: none"> <li>a. Weekly.</li> <li>b. Monthly or other schedule.</li> </ol> </li> <li>8. Receiving supplies or equipment       <ol style="list-style-type: none"> <li>a. A packing slip will confirm items ordered and contained in the package           <ol style="list-style-type: none"> <li>1) May include items back ordered</li> <li>2) Person opening package is responsible for verifying contents and initialing packing slip as a record of receipt.</li> <li>3) May receive shipments via UPS, Federal Express or a local delivery service.</li> </ol> </li> </ol> </li> <li>9. Invoice needs to be matched up to the packing slip before payment is issued.</li> <li>10. Stocking inventory       <ol style="list-style-type: none"> <li>a. New supplies are placed behind existing or older items.</li> <li>b. May require the date received to be written on them according to your facility protocol.</li> <li>c. Labels with expiration dates may be necessary to comply with state and federal regulations.</li> </ol> </li> </ol>	
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<p><b>Objective 4</b>  <b>List the importance of intra-office communication.</b></p> <ul style="list-style-type: none"> <li>A. Active listening and situational awareness and be aware of non-verbal communication.</li> <li>B. Plan regularly scheduled 15-30 minute staff meetings; beginning and ending on time.</li> <li>C. Daily five minute huddles to review day and potential challenges and interventions.</li> <li>D. Establish a suggestion box for staff meetings.</li> <li>E. Distribute minutes to personnel after each meeting.</li> <li>F. Set up bulletin boards for job information, announcements and safety reminders.</li> <li>G. Develop a “team player” attitude.</li> <li>H. Follow a chain of command type of organizational structure within the office.</li> <li>I. Create a flow sheet that represents where each health care worker fits into the big picture as a team player <ul style="list-style-type: none"> <li>1. Discuss problems or issues with coworkers first.</li> <li>2. Maintain a positive attitude.</li> </ul> </li> <li>J. Keep manager informed of problems.</li> <li>K. Ask questions if unsure about tasks and functions in order to help prevent problems and errors from occurring.</li> <li>L. Minimize interruptions with superiors by planning appropriate times to discuss important issues.</li> <li>M. Demonstrate initiative to correct problems and suggest solutions in a report to superiors.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Create a list of potential situations and discuss possible communication based solutions.</li> <li>D. Have students diagram a chain of command for a four physician office with an office manager, administrative and clinical supervisor and a staff of eight.</li> <li>E. Create a scenario with a challenge that requires the team to collaboratively problem solve.</li> <li>F. Present employee conflict scenarios and have students role play as employee/employee, employee/supervisor and employee/patient. Discuss suggested win/win solutions.</li> </ul>
<p><b>Objective 5</b>  <b>Discuss the role of the employer and employee to provide a safe working environment.</b></p> <ul style="list-style-type: none"> <li>A. Employers must maintain protection and security of the workplace and provide safety to all employees and visitors <ul style="list-style-type: none"> <li>1. Create a mechanism that encourages safety observations.</li> <li>2. Never leave electrical cords in foot traffic areas.</li> <li>3. Never overload electrical outlets.</li> <li>4. Secure file cabinets and other furniture.</li> <li>5. Maintain working locks on windows and doors.</li> <li>6. Identify hazardous areas in the facility <ul style="list-style-type: none"> <li>a. Laboratory and specimen processing areas.</li> <li>b. Sharps containers and their use.</li> <li>c. Biohazardous waste container locations.</li> </ul> </li> <li>7. Disaster preparedness <ul style="list-style-type: none"> <li>a. Evacuation protocol.</li> <li>b. Evacuation route.</li> <li>c. Fire alarm.</li> </ul> </li> <li>8. Smoke detector location and maintenance.</li> <li>9. Fire extinguisher location and operation of extinguishers.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Ask students to design an evacuation route of the classroom but do not let them simply copy an existing plan.</li> <li>D. Have students complete an incident report for a patient safety scenario.</li> <li>E. Have student research ergonomics in a medical office for equipment and attire.</li> </ul>

<p>10. Security system operation and protocols.</p> <p>B. Employee role</p> <ol style="list-style-type: none"> <li>1. Use proper body mechanics.</li> <li>2. Wipe up spills immediately and properly.</li> <li>3. No food, drink or application of makeup except in designated areas.</li> <li>4. Maintain confidentiality of patient records by keeping them out of public view.</li> <li>5. Return computer screen to main menu when not in use and keep passwords confidential.</li> <li>6. Place personal belongings out of general view</li> <li>7. Implement OSHA precautions.</li> <li>8. Put stools and chairs in their proper places.</li> <li>9. Implement HIPAA protocols at all times.</li> </ol>	
<p><b>Objective 6</b>  <b>Name components in making travel arrangements.</b></p> <p>A. Travel arrangements may be for a medical convention or vacation</p> <ol style="list-style-type: none"> <li>1. Complete registration form for conference.</li> <li>2. Create a matrix for an appointment schedule.</li> <li>3. Arrange for transportation. <ol style="list-style-type: none"> <li>a. Car rental reservation discounts usually given to physicians if they show their American Medical Association card.</li> <li>b. Shuttle service.</li> <li>c. Limousine.</li> <li>d. Train.</li> <li>e. Personal car.</li> <li>f. Airplane aisle, window, front, middle, first class, business class and others.</li> <li>g. Bus.</li> <li>h. Cab.</li> </ol> </li> <li>4. Make hotel reservations at desired location.</li> <li>5. Consult with travel agency or travel agent.</li> <li>6. Compile information about preferences prior to completing the arrangements.</li> </ol>	<p>A. Lecture/Discussion</p> <p>B. Assigned Readings</p> <p>C. Have students research travel arrangements for a medical conference including itinerary, travel arrangements, hotel, registration and expense report.</p>
<p>D. Coping mechanisms</p> <ol style="list-style-type: none"> <li>1. Repression involves forgetting about situations that produced the stress.</li> <li>2. Denial is the refusal to acknowledge situations.</li> <li>3. Rationalization is minimizing a disappointment by finding something positive in the outcome.</li> <li>4. Compensation is redirecting a desire from something unobtainable into efforts toward achieving something similar but reasonable.</li> <li>5. Displacement is redirecting anger toward one person onto an object or different person.</li> </ol> <p>E. Coping strategies</p> <ol style="list-style-type: none"> <li>1. Attempt to reduce the irritant.</li> <li>2. Organize and limit activities.</li> <li>3. Attempt to lessen fear of failure and just do the</li> </ol>	<p>A. Lecture/Discussion</p> <p>B. Assigned Readings</p> <p>C. Guide students in the practice of stress reducing exercises at various times in your class. This should take no longer than 3-5 minutes.</p> <p>D. Have students role play scenarios involving patients, coworkers and supervisors that might cause stress and/or burnout. Discuss on-the-job</p>

<p>best you can.</p> <p>4. When feeling anxious, talk to someone about the problem and “let off steam”.</p> <p>F. Relaxation techniques</p> <ol style="list-style-type: none"> <li>1. Relieve muscle tension by stretching the neck, shoulders, back, arms, upper body and legs. This may take only five minutes.</li> <li>2. Breathing techniques can be effective.</li> <li>3. Visualization allows the mind to wander and focuses on positive and relaxing situations; choose an appropriate time in the workday.</li> <li>4. Allow time for yourself and plan time to relax.</li> <li>5. Set realistic goals for yourself.</li> <li>6. Be organized and efficient.</li> <li>7. Maintain a healthy sense of humor; laughter can be very therapeutic.</li> <li>8. Identify sources of conflict and try to resolve them.</li> </ol> <p>G. Job burnout describes a condition that results from too much or too little stress and can occur slowly over months or develop rapidly</p> <ol style="list-style-type: none"> <li>1. To reduce or relieve symptoms, maintain good eating and sleeping habits.</li> <li>2. Get physical exercise daily.</li> <li>3. Relax periodically.</li> <li>4. Slow down to limit physical and mental pressures.</li> <li>5. Ask for help.</li> <li>6. Understand what can be changed and what cannot.</li> <li>7. Understand personal limitations.</li> <li>8. Take short vacations at least twice a year.</li> <li>9. Personalize work space.</li> <li>10. Get a good understanding of a position and the stress involved before accepting it.</li> </ol>	<p>activities to help employees through stressful times.</p> <p>E. Have students plan a one-day employee retreat.</p>
<p><b>Objective 8</b>  <b>Explain the legal implications of hiring, terminating and disciplining employees.</b></p> <ol style="list-style-type: none"> <li>A. All employers must evaluate employees on an annual basis and this should be a positive experience for the employee.</li> <li>B. Employee read and sign the evaluation and be allowed to ask questions and make comments.</li> <li>C. Employers should have an employee file for placement of evaluations.</li> <li>D. Disciplinary action needs to be documented according to office protocol <ol style="list-style-type: none"> <li>1. Verbal counseling is generally done for minor or first-time occurrences.</li> <li>2. Notes related to verbal warnings, actions taken and any employee comments are put in</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students role play a disciplinary action for violation of patient privacy while using the telephone.</li> <li>D. Have students prepare an evaluation checklist for a medical administrative assistant.</li> <li>E. Have students outline a process for making an employee aware of a</li> </ol>

<p>employee files.</p> <ol style="list-style-type: none"> <li>3. Written warnings are given for more serious problems such as substance abuse and breach of confidentiality.</li> <li>4. Employees should sign any written notices that may be used as evidence in the event of a wrongful discharge lawsuit.</li> </ol> <p>E. Termination of an employee must follow policies precisely and all disciplinary actions must be clearly and objectively stated</p> <ol style="list-style-type: none"> <li>1. Reasons for termination include <ol style="list-style-type: none"> <li>a. Excessive tardiness or absenteeism.</li> <li>b. Inappropriate dress or behavior.</li> <li>c. Substance abuse.</li> <li>d. Lying, stealing or falsifying medical records.</li> <li>e. Breaching patient confidentiality.</li> <li>f. Embezzlement.</li> </ol> </li> <li>2. All steps in the process must be fully documented.</li> <li>3. Firing should come near the end of the day and the break with the employee should be clean and immediate.</li> <li>4. After dismissing an employee <ol style="list-style-type: none"> <li>a. Do not leave the person in the office unattended.</li> <li>b. Request office keys and other equipment in the employee's possession before the dismissed employee leaves the building.</li> </ol> </li> </ol>	<p>meeting to discuss ongoing excessive tardiness (this is a second meeting to discuss tardiness).</p> <p>F. Ask student to write one page describing labor laws relative to discipline and dismissal of employee.</p>
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