

# Component III: Clinical

## Module A: Exam Room Procedures

### Topic 3: Patient Screening Intake

#### Statement of Purpose

To prepare the learner with the basic knowledge and skills concerning the theoretical and procedural requirements for assisting with patient screening and intake.

#### Student Learning Outcomes

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

1. Spell and define the key vocabulary terms.
2. Discuss the origin and purpose of screening in the medical facility.
3. Describe the forms used to document patient information during return office visits.
4. List the topics that should be covered each time a patient visits the office to see the physician and correctly document the information in the appropriate sections of forms used.
5. Discuss questions/techniques that can be used during the interview to obtain pertinent information regarding a patient's condition.
6. Discuss appropriate patient education while interviewing the patient.
7. Discuss the legal and ethical implications of screening patients.

#### Terminology

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|--|---------------------------|
| 1. Assessment  | 8. Over the counter (OTC) |
| 2. Chief complaint (CC)  | 9. Present illness (PI)   |
| 3. Family history (FH)   | 10. Screening             |
| 4. Hereditary  | 11. Signs                 |
| 5. Health Insurance Portability and Accountability Act (HIPAA) | 12. Subjective            |
| 6. Medical history   | 13. Symptoms              |
| 7. Objective   | 14. Triage                |

#### References

1. Davis, F.A. (2013). *Taber's Cyclopedic Medical Dictionary* (22<sup>nd</sup> Ed.). Philadelphia: F.A. Davis Company.
2. Dennerll, J.T., & Davis, P.E. (2010). *Medical Terminology: A Programmed Systems Approach* (10<sup>th</sup> Ed.). Clifton Park, NY: Delmar, Cengage Learning.
3. Kronenberger, J., Southard D. L., & Woodson, D. (2013). *Comprehensive Medical Assisting* (4<sup>th</sup> Ed.). Philadelphia, PA: Lippincott, Williams & Wilkins.
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.
5. Lindh, W., Pooler, M., Tampara, C., Dahl, B., Morris J. (2009). *Comprehensive Medical Assisting Administrative and Clinical Competencies* (4<sup>th</sup> Ed.). Clifton Park, NY: Cengage Learning.
6. Kier, L., Wise, B.A., Krebs, C., & Kelley-Arney, C., (2011) *Medical assisting administrative and clinical competencies* (7<sup>th</sup> Ed.) Clifton Park, NY: Thomson Delmar Learning.

7. Booth, K.A., Whicker, L.G., Wyman, T.D., & Moaney-Wright, S. (2011). *Medical Assisting: Administrative & Clinical Competencies with Anatomy and Physiology*. (4th Ed.). New York, NY: McGraw-Hill Company, Inc.
8. 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.

### **Websites**

1. [www.osha.gov](http://www.osha.gov)
2. [www.cdc.gov](http://www.cdc.gov)
3. [www.innerbody.com](http://www.innerbody.com)
4. [www.mbc.ca.gov/allied/medical\\_assistants.html](http://www.mbc.ca.gov/allied/medical_assistants.html)
5. [www.jointcommision.org](http://www.jointcommision.org)
6. [www.hhs.gov/ocr/office/index.html](http://www.hhs.gov/ocr/office/index.html)
7. [www.calpatientguide.org/](http://www.calpatientguide.org/)

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>Discuss the origin and purpose of screening in the medical facility.</b></p> <ul style="list-style-type: none"> <li>A. Origin <ul style="list-style-type: none"> <li>1. Screening is one of the most critical and significant of all medical responsibilities <ul style="list-style-type: none"> <li>a. The term “triage” originated during war time and it referred to the sorting and assessment of soldiers’ injuries. After the medic made a decision about care, the soldier was dispatched for treatment.</li> </ul> </li> <li>2. The term triage is also used in prioritizing the conditions of injured persons following a disaster <ul style="list-style-type: none"> <li>a. Injured are separated into groups according to the seriousness of their needs.</li> <li>b. Injured are tagged with a particular color-coded tape or cloth.</li> </ul> </li> </ul> </li> <li>B. Purpose in medical facility <ul style="list-style-type: none"> <li>1. Term common in medical facilities across the country <ul style="list-style-type: none"> <li>a. Emergency department.</li> <li>b. Office.</li> <li>c. Clinics.</li> </ul> </li> <li>2. Private area established for the interview process.</li> <li>3. Patients’ symptoms are appraised and a judgment is made regarding the nature of the patients’ complaints <ul style="list-style-type: none"> <li>a. It is vital that the patient’s immediate needs are met. The nature of their managed care should be a secondary concern.</li> <li>b. Reason for the patient’s visit may be determined by the Medical Assistant who performs the screening interview along with input as necessary from other members of the health care team.</li> <li>c. Process occurs both via the telephone and in person.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> </ul>

<p>C. Job responsibility under much debate</p> <ol style="list-style-type: none"> <li>1. The terms triage, screening, and assessment are often interchanged.</li> <li>2. The Medical Assistant's role is to interview the patient to gather necessary information <ol style="list-style-type: none"> <li>a. It is essential that accurate and thorough information be obtained and documented.</li> <li>b. The Medical Assistant is not to make any medical judgments.</li> <li>c. The information obtained is passed on to the physician.</li> </ol> </li> <li>3. The physician's role is to make medical judgments regarding the patient's care relying in part on information obtained by the Medical Assistant during the initial interview.</li> </ol>	
<p><b>Objective 3</b>  <b>Describe the forms used to document patient information during return office visits.</b></p> <ol style="list-style-type: none"> <li>A. Progress notes.</li> <li>B. Flow sheets.</li> <li>C. Problem lists.</li> <li>D. Telephone messages.</li> <li>E. Medical history.</li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have learner accurately identify the various forms and document appropriate, accurate information in the correct places.</li> </ol>
<p><b>Objective 4</b>  <b>List the topics that should be covered each time a patient visits the office to see the physician and correctly document the information.</b></p> <ol style="list-style-type: none"> <li>A. Chief complaint.</li> <li>B. Present illness.</li> <li>C. Past medical history <ol style="list-style-type: none"> <li>1. Childhood diseases.</li> <li>2. Major illness.</li> <li>3. Injuries.</li> <li>4. Hospitalization.</li> <li>5. Surgeries.</li> <li>6. Allergies.</li> <li>7. Immunizations.</li> <li>8. Current medications <ol style="list-style-type: none"> <li>a. Prescription.</li> <li>b. Over the counter.</li> </ol> </li> </ol> </li> <li>D. Family medical history.</li> <li>E. Personal history (lifestyle patterns).</li> <li>F. Review of body systems.</li> <li>G. Other areas according to institutional policy.</li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have learner document correct information in appropriate section of form.</li> </ol>
<p><b>Objective 5</b>  <b>Discuss questions/techniques that can be used during the interview to obtain pertinent information regarding a patient's condition.</b></p> <ol style="list-style-type: none"> <li>A. Effective listening <ol style="list-style-type: none"> <li>1. Listening attentively (active listening) is one of the</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> </ol>

<p>most important skills you will need for a successful interview.</p> <ol style="list-style-type: none"> <li>2. Active listening       <ol style="list-style-type: none"> <li>a. Hear what's said.</li> <li>b. Think about what is said.</li> <li>c. Respond to what the patient has said.</li> </ol> </li> </ol> <p>B. Be aware of nonverbal clues and body language</p> <ol style="list-style-type: none"> <li>1. Nonverbal communication       <ol style="list-style-type: none"> <li>a. Tone of voice.</li> <li>b. Facial expression.</li> <li>c. Body language.</li> </ol> </li> <li>2. The Medical Assistant may need to have extra patience and offer encouragement.</li> </ol> <p>C. Use lay terms.</p> <p>D. Summarize to form a general picture.</p> <p>E. Steps to help you conduct a successful interview</p> <ol style="list-style-type: none"> <li>1. Review patient's record       <ol style="list-style-type: none"> <li>a. Patient history.</li> <li>b. Medications.</li> <li>c. Chronic problems.</li> <li>d. Family issues.</li> </ol> </li> <li>2. Plan the interview       <ol style="list-style-type: none"> <li>a. Have a general idea of questions to ask.</li> <li>b. Stay focused.</li> <li>c. Obtain all the necessary information.</li> </ol> </li> <li>3. Approach the patient and request the interview       <ol style="list-style-type: none"> <li>a. It is more courteous to seek permission to ask questions than to say you need to take a history.</li> <li>b. Helps patient feel more comfortable and emphasize the importance of the interview process.</li> </ol> </li> <li>4. Making the patient feel at ease       <ol style="list-style-type: none"> <li>a. Create a relaxed atmosphere and establish rapport           <ol style="list-style-type: none"> <li>1) Acknowledge reason for the visit.</li> <li>2) Ask how patient prefers to be addressed.</li> <li>3) Clarify pronunciation of a difficult name.</li> </ol> </li> <li>b. Sit with the patient.</li> <li>c. Make note of patient's affect.</li> </ol> </li> <li>5. Conduct the interview in private without interruptions       <ol style="list-style-type: none"> <li>a. Escort patient to private room or area.</li> <li>b. Close the door.</li> <li>c. Do not rush.</li> <li>d. Maintain eye contact.</li> <li>e. Effective methods of collecting patient data           <ol style="list-style-type: none"> <li>1) Ask open-ended questions.</li> <li>2) Ask hypothetical questions.</li> </ol> </li> </ol> </li> </ol>	<p>C. Use patient scenario to provide practice using interview skills</p> <ol style="list-style-type: none"> <li>1. Inform students they can elaborate on the basic information given</li> <li>2. Divide the class into groups of twos</li> <li>3. Away from classroom setting, students are to audiotape the interview process of each pair</li> <li>4. The student is to then evaluate how she/he believes they did</li> <li>5. Evaluation report and audio tape to be submitted to instructor for review/grade</li> </ol>
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<ul style="list-style-type: none"> <li>3) Mirror patients' responses and verbalize the implied.</li> <li>4) Focus on the patient.</li> <li>5) Encourage patient to take the lead.</li> <li>6) Encourage patient to provide additional information.</li> <li>7) Encourage patient to evaluate his or her situation.</li> </ul>	
<p><b>Objective 6</b>  <b>Discuss appropriate patient education while interviewing the patient.</b></p> <ul style="list-style-type: none"> <li>A. Provide patient education resources</li> <li>B. Ask if there are further questions</li> <li>C. Instruct patients to write down questions that arise between visits</li> <li>D. Include companion, caregiver or interpreter in discussions when appropriate</li> <li>E. Provide contact information for office/clinic</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Ask students to identify a patient education issue of importance to them. Ask students to demonstrate to the class how they would discuss that information with a patient.</li> </ul>
<p><b>Objective 7</b>  <b>Discuss the legal and ethical implications of interviewing patients.</b></p> <ul style="list-style-type: none"> <li>A. Remember all data you obtain is subject to legal and ethical considerations according to Health Insurance Portability and Accountability Act (HIPAA)</li> <li>B. Discuss the components of the California Patient's Bill of Rights</li> <li>C. Review the Physician's and Medical Assistant's role in interviewing patients <ul style="list-style-type: none"> <li>1. Only Physician can give diagnosis</li> <li>2. Medical Assistant can only obtain information and are NOT to offer any medical advice</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings <ul style="list-style-type: none"> <li>1. California Patient's Bill of Rights  <a href="http://www.calpatientguide.org">www.calpatientguide.org</a></li> <li>2. HIPAA Handouts  <a href="http://www.hhs.gov/ocr/office/index.html">www.hhs.gov/ocr/office/index.html</a></li> </ul> </li> <li>C. Present case studies, scenarios and discuss issues.</li> <li>D. Role play and discuss viewpoints.</li> </ul>