

## Component II: Administrative

### Module A: Medical Office Reception

#### Topic 2: Role of the Receptionist

##### Statement of Purpose

To prepare the learner with basic knowledge and skills necessary to assist incoming and outgoing patients.

##### Student Learning Outcomes

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

1. Spell and define key terms.
2. Describe the role of the Medical Office Receptionist.
3. Identify skills necessary to fulfill the duties required by a facility.
4. Demonstrate appropriate communication skills.
5. Differentiate ethical and legal issues pertaining to the receptionist's role.
6. Locate resources and information for patients and employers.

##### Terminology

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|-----------------------------------|--------------------------|
| 1. Appointments                   | 12. Patient Portal       |
| 2. Attitude                       | 13. Practice Management  |
| 3. Co-insurance                   | 14. Professionalism      |
| 4. Communication                  | 15. Referrals            |
| 5. Confidentiality                | 16. Scanner              |
| 6. Co-pay                         | 17. Scope of practice    |
| 7. Deductible                     | 18. Screening            |
| 8. Electronic Health Record (EHR) | 19. Standards            |
| 9. Ethics                         | 20. Telephone messages   |
| 10. Facility                      | 21. Telephone techniques |
| 11. Law                           | 22. Time management      |

##### References

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5. Larsen, W. (2011). *Computerized Medical Office Procedures: A Work text Using Medi-soft v16* (3<sup>rd</sup> Ed.). Philadelphia, PA: Saunders Elsevier.
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| Content Outline/Theory Objectives   | Suggested Learning Activities   |
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| <p><b>Objective 1</b><br/> <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 terms listed 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><br/> <b>Describe the role of the Medical Office Receptionist.</b></p> <ul style="list-style-type: none"> <li>A. Prepare the waiting room environment <ul style="list-style-type: none"> <li>1. Unlock doors as appropriate.</li> <li>2. Turn on electronic devices.</li> <li>3. Check temperature of reception room.</li> <li>4. Check lighting.</li> <li>5. Arrange current magazines, and books daily.</li> <li>6. Check to assure cleanliness of children’s area, table and any interactive toys, working of DVD or video player.</li> <li>7. Check to assure cleanliness of waiting room.</li> <li>8. Counters, table surfaces and toys should be sanitized daily or twice a day, depending on contamination.</li> <li>9. Arrange seating placement, if necessary.</li> <li>10. Stock any necessary pamphlet holders or patient information.</li> <li>11. Feed fish, if aquarium present.</li> <li>12. Turn on relaxing music.</li> <li>13. Water any live plants, if needed.</li> <li>14. Turn on television, if present.</li> </ul> </li> <li>B. Greet patients in a professional manner <ul style="list-style-type: none"> <li>1. First impressions are important, so it is key to be welcoming and have a genuine smile.</li> <li>2. Greet patients (“Good morning,” “Good afternoon,” or “Good evening”).</li> <li>3. Provide a check-in method for patients.</li> <li>4. Offer various forms of assistance to any participant as necessary.</li> <li>5. Keep a positive attitude.</li> <li>6. Have empathy and show interest, concern and courtesy.</li> <li>7. Monitor the very ill, injured or upset patients/clients in the reception area.</li> <li>8. May have to monitor children who may be intent on disrupting others.</li> <li>9. Remember that you set the social climate for</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Reading</li> <li>C. Using the telephone techniques and screening information, create situations for the students to address. Have several situations prepared and corrected methods available to assist in student learning.</li> <li>D. Distribute sample forms. Have students fill out the forms. Evaluate time frame for intake process (filling out forms). Advise new patients about items to bring to first appointment and how early to arrive.</li> <li>E. Have student’s role play scenarios of patients/clients arriving in the reception area.</li> <li>F. For more content, refer to topic 5 in this module.</li> </ul> |

the visit.

10. Keep good personal hygiene.
  11. Keep good health and grooming.
- C. Answer telephone calls according to facility protocols
1. Answer the telephone promptly.
  2. Identify yourself and your facility.
  3. Be ready to identify reason for call
    - a. Follow protocol for emergency.
    - b. Handle call.
    - c. Forward call to appropriate staff.
    - d. Take message if needed.
  4. Retrieve messages from voice mail, and answering service.
- D. Check Patient Portal and EHR for messages
1. Check e-mail and distribute to appropriate staff.
  2. Check faxes and distribute to appropriate staff.
- E. Initiate new patient processing and orient patients
1. New patient forms
    - a. Have patient complete forms or assist patient with patient information form/information sheet, name, address, telephone numbers; may include family member contact.
    - b. Have patient complete or assist patient with patient medical history forms.
    - c. Have patient complete new patient insurance information and documentation.
    - d. Photocopy copy of insurance card (or scan into an EHR along with Driver's License).
    - e. Offer various forms of assistance to any participant as necessary.
    - f. Give brochures or business card with necessary contact information.
    - g. Provide location of water fountains and restrooms.
    - h. Let patient know if running behind schedule.
  2. Encounter form or superbill (manual)
    - a. Initiate the correct type of form required.
    - b. Determine the type of insurance or method of payment to be used from the patient the information form.
    - c. Form may be generated automatically by EHR (electronic).
  3. Determine each patient's insurance, managed care plan, or financial responsibility
    - a. Insurance verification.
    - b. Authorization information.
    - c. Referral information.

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| <ul style="list-style-type: none"> <li>d. Collect co-pay or deductible if appropriate.</li> <li>e. Screen non-patients and other visitors.</li> </ul> <p>F. Identify external customers</p> <ul style="list-style-type: none"> <li>1. Patient.</li> <li>2. Pharmaceutical representative or sales personnel.</li> <li>3. Family members.</li> <li>4. Teaching personnel.</li> <li>5. Externs or students.</li> <li>6. Physicians or other professionals.</li> <li>7. Maintenance personnel.</li> </ul> <p>G. Schedule appointments</p> <ul style="list-style-type: none"> <li>1. Written appointment book.</li> <li>2. PM/EHR appointment schedule.</li> <li>3. Legal implications.</li> </ul> <p>H. Utilize computer applications/EHR in the medical facility.</p> <p>I. Serve as a liaison between patient and physician or other allied health personnel.</p> |  |
| <p><b>Objective 3</b><br/> <b>Identify skills necessary to fulfill the duties required by a facility.</b></p> <ul style="list-style-type: none"> <li>A. Time management.</li> <li>B. Positive attitude.</li> <li>C. Provide assistance to individuals as required by the physical environment of the facility.</li> <li>D. English reading skills required.</li> <li>E. Ability to verbalize and communicate in writing.</li> <li>F. Use United States currency to receive and distribute funds as necessary.</li> </ul>   | <ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Reading</li> </ul>   |
| <p><b>Objective 4</b><br/> <b>Demonstrate appropriate communication skills.</b></p> <p>Please refer to CORE I: Modules A and D for a review of skills and techniques.</p>  | <ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Reading</li> <li>C. Role-play using real problems. Create a list of potential patient and receptionist problems. Give the students the opportunity to solve the problems and discuss the methods students used.</li> </ul> |
| <p><b>Objective 5</b><br/> <b>Differentiate ethical and legal issues pertaining to the receptionist's role.</b></p> <ul style="list-style-type: none"> <li>A. Discuss law and the California scope of practice for Medical Assistants.</li> <li>B. Define receptionist's ethics <ul style="list-style-type: none"> <li>1. Standards of conduct.</li> <li>2. Moral judgment.</li> </ul> </li> <li>C. Define receptionist's legal responsibilities</li> </ul>  | <ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Reading</li> <li>C. Analyze a given scenario using critical thinking skills.</li> <li>D. Use the medical assisting scope of practice to assist in how the</li> </ul>   |

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| <ol style="list-style-type: none"> <li>1. According to law included in the scope of practice.</li> <li>2. According to formal job description.</li> <li>3. Maintaining confidentiality.</li> <li>4. Insuring patient's rights are followed.</li> </ol>  | <p>Medical Assistant can assist in correcting a situation.</p> <p>E. What can be done by the Medical Assistant?</p> <p>F. <a href="http://www.cmaa-ca.org">www.cmaa-ca.org</a></p> <p>G. See Appendix – Administrative A-4.3 on HIPAA</p>                            |
| <p><b>Objective 6</b><br/> <b>Locate resources and information for patients and employers.</b></p> <ol style="list-style-type: none"> <li>A. Hospital</li> <li>B. Physicians</li> <li>C. Local help lines for telephone referrals</li> <li>D. State governing agencies</li> <li>E. Insurance companies</li> <li>F. Patient education resources</li> <li>G. Resource materials and publications</li> </ol> | <ol style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Reading</li> <li>C. Have the students locate specific resources for five of these items. Give address, phone, and any other specific information related to the source.</li> </ol> |