

Component II: Administrative

Module A: Medical Office Reception

Topic 3: Office Equipment and Environment

Statement of Purpose

To prepare the learner with basic knowledge and skills necessary to coordinate various types of supplies, office equipment, preventative maintenance and contracts and maintain the physical office setting appropriate to accommodate patients and customers.

Student Learning Outcomes

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

1. Spell and define key terms.
2. Demonstrate use of the various types of equipment needed to carry out the duties of an Administrative Medical Assistant.
3. Demonstrate skill in operating multiple types of telecommunication methods and equipment.
4. Discuss the pros and cons of leasing, renting and purchasing office equipment.
5. Assess the ergonomic environment in a facility.
6. Prepare an inventory of required equipment and supplies used within an administrative office setting.
7. Analyze steps to complete a purchase order.
8. Explain the impact of the Americans with Disabilities Act (ADA) on the physical structure of the medical office.

Terminology

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|---|---------------------------------------|
| 1. Answering machine | 21. Patient Portal |
| 2. Automated Clearing House (ACH) | 22. Personal Digital Assistant (PDA) |
| 3. Biohazard container | 23. Postage meter |
| 4. Calculator | 24. Postage scale |
| 5. Check protector | 25. Practice Management software |
| 6. Check writer | 26. Purchase order |
| 7. Computer | 27. Remote monitoring |
| 8. Confidentiality safe | 28. Repetitive strain injury (RSI) |
| 9. Copy machine | 29. Scanner |
| 10. Crash cart | 30. Smart Phone/cell phone |
| 11. eFAX | 31. Telecommunications |
| 12. Electronic Health Record (EHR) | 32. Telephone systems |
| 13. Ergonomic | 33. Ten-key adding machine |
| 14. Fax machine | 34. Video Conferencing |
| 15. Health Insurance Portability and Accountability Act (HIPAA) | 35. vMSG (electronic voice messaging) |
| 16. iPad | 36. Voice mail |
| 17. Keyboard | 37. Voice recognition |
| 18. Lease agreement | 38. Warranty |
| 19. Pager | 39. Word processor |
| 20. Paper shredder | |

References

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Content Outline/Theory Objectives	Suggested Learning Activities
<p>Objective 1 Spell and define key terms</p> <ul style="list-style-type: none"> A. Review the terms listed in the terminology section. B. Spell the terms listed accurately. C. Pronounce the terms correctly. D. Use the terms in their proper context. 	<ul style="list-style-type: none"> A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman, and concentration. B. Administer vocabulary pre-test and post-test. C. Discuss learning gaps and plan for applying vocabulary.
<p>Objective 2 Demonstrate use of the various types of equipment needed to carry out the duties of an Administrative Medical Assistant.</p> <ul style="list-style-type: none"> A. Keep instruction manuals for office equipment. <ul style="list-style-type: none"> 1. Office equipment used daily changes frequently with technological advances. 2. Technology is constantly evolving to become smaller in size, larger in capacity, and faster in speed, which makes it important to keep manuals. B. Be familiar with computer components and software programs designed to accept, store, process and provide information <ul style="list-style-type: none"> 1. Input information that enters the computer <ul style="list-style-type: none"> a. Commands from the keyboard. b. Data from another device <ul style="list-style-type: none"> 1) Scanner. 2) Digital camera. c. Mouse. d. Voice recognition system. 2. Processing/manipulating data to carry out tasks. 3. Output/External hardware <ul style="list-style-type: none"> a. Anything that exits the computer (i.e., numbers, pictures, printed pages, electrocardiograms). b. Monitors, speakers, printers, scanners, modems. 4. Storage media <ul style="list-style-type: none"> a. CDs. b. Zip drive. c. USB flash drive. d. Tapes. e. DVDs. f. External hard drive (obsolete). 5. Personal Computer <ul style="list-style-type: none"> a. Desktop, most common type of personal computer. b. Laptop or notebook, smaller portable 	<ul style="list-style-type: none"> A. Lecture/Discussion B. Assigned Reading C. Have students demonstrate the ability to use a word processor or a computer by composing an inventory list of administrative supplies used in the classroom. D. Have students participate in a timed exercise using an adding machine, calculator or computer by accurately totaling a list of numbers. E. Have students open copy machine and trace the paper path, locate the toner change or exchange area, and load paper trays. F. Type and accurately prepare a fax cover sheet noting confidentiality.

- computer.
 - c. Personal Digital Assistant (PDA), handheld device.
 - d. iPad.
 - e. Smartphone.
- 6. Special adaptations
 - a. Imaging enhancement.
 - b. Voice recognition.
 - c. Transcription capability.
 - d. Internet and e-mail.
 - e. Capacity to convey sound.
 - f. Video conferencing.
- 7. Practice Management and EHR stores information once inputted
 - a. Patient information (demographics).
 - b. Billing information.
 - c. Patient treatment.
 - d. Patient history.
 - e. Recall/reminder system.
 - f. Print forms.
 - g. Post charges.
 - h. Complete insurance forms.
 - i. Accounts receivable aging.
 - j. Appointment scheduling.
 - k. Create patient statements.
 - l. Daily register report.
 - m. Charge entry.
 - n. Inventory control.
 - o. Identify patients with specific diagnosis.
- 8. Additional software capabilities
 - a. Accounting.
 - b. Payroll.
 - c. Database management.
- C. Understand and use computation equipment, basic instruction per type available
 - 1. Adding machine
 - a. Ten-key adding machines most common.
 - b. Hard copy of calculations.
 - c. New employee testing for this skill.
 - d. To operate, number is entered first, and then function is entered.
 - 2. Calculator
 - a. Same keyboard as an adding machine.
 - b. Battery or solar powered.
 - c. To operate, number is entered first and then function is entered (variations exist).
 - 3. Computer
 - a. Calculator functions.
 - b. Same keyboard format.
 - c. More technical capabilities.
 - d. Make sure number lock is in the on

position on keyboard.

D. Understand and use the copy machine effectively and efficiently

1. Removing staples.
2. Keeping glass clean.
3. Regular scheduled maintenance.
4. Shred unwanted or extra copies.
5. Understanding HIPAA issues around privacy.
6. The copy machine is the most used piece of equipment in the office
 - a. Photocopy image of a document.
 - b. Photocopy in Black and white.
 - c. Photocopy in Color.
7. Use multiple types and functions
 - a. Desktop.
 - b. Portable.
 - c. Industrial.
8. Use multiple additional functions
 - a. Enlargement.
 - b. Reduction.
 - c. Collation.
 - d. Transparencies.
 - e. Staple.
 - f. Two-sided copies.
9. Keep a log of supplies and order when needed.

E. Understand and use a fax machine

1. Send/receive printed images over a phone line (old method)
 - a. Letters.
 - b. Reports.
 - c. Laboratory reports.
 - d. Prescription orders.
 - e. Consultation reports.
 - f. X-ray reports.
 - g. Information regarding patients.
2. Send/receive faxes within EHR environment (new method)
 - a. (a-g) same as above.
 - b. Sending and receiving chart information to other providers/insurance payers.
3. Legal ramifications
 - a. Possible prosecution under federal and state regulations for unauthorized use of information under HIPAA.
 - b. Cover sheet to identify receiver and disclaimer stating the confidentiality of the contents of the medical information (old method)
 - 1) Precedes the document to be faxed
 - 2) On cover sheet
 - Name of practice.

<ul style="list-style-type: none"> • Address. • Telephone number. • Fax number (letter head). • Sender's name. • Recipient's name. • Number of pages. <ul style="list-style-type: none"> c. Follow-up phone call to assure receipt of medical records and reports. d. Fax only to identified and secure fax lines (Dedicated phone line to send and receive 24 hours a day). <p>F. Postage equipment</p> <ul style="list-style-type: none"> 1. Postal meter is a sealed unit regulated by the United States Postal Service (leased equipment) <ul style="list-style-type: none"> a. Variety of Functions <ul style="list-style-type: none"> 1) Weight. 2) Seal. 3) Stuff envelopes. b. Postage imprinted on envelopes or adhesive strips with postmark date. c. Daily date changes (the date on older machines may need to be changed daily). d. Postage usage tracked. e. To set machine for additional postage: <ul style="list-style-type: none"> 1) Pay-in-advance (mail check). 2) Post-in-advance (special fees). 3) ACH debit. 4) ACH credit. 5) Federal wire. 2. Postage scale weighs articles to identify correct amount of postage due <ul style="list-style-type: none"> a. Manual b. Electronic c. Large and small d. Newer models connected to postage meter <p>G. Familiarize self with other types of equipment</p> <ul style="list-style-type: none"> 1. Paper shredder 2. Office safe 3. Check writer or imprinter 4. Dictation/Transcription machine 5. Scanner 	
<p>Objective 3 Demonstrate skill in operating multiple types of telecommunications methods and equipment.</p> <ul style="list-style-type: none"> A. Pager B. Smart Phone/Cell phone C. Fax machine or eFAX D. Voice mail or vMSG system E. E-mail, EHR and Patient Portal 	<ul style="list-style-type: none"> A. Lecture/Discussion B. Assigned Reading C. Role Play <ul style="list-style-type: none"> 1. Receiving and placing telephone calls. Have a

<p>F. Telephone system</p> <ol style="list-style-type: none"> 1. With multiple lines 2. With a single line 3. Answering service 4. Answering machine <p>G. Remote monitoring</p> <ol style="list-style-type: none"> 1. Blood pressure 2. Glucose 	<p>student use their experiences to make up reasonable situations. Have additional situations for the students to respond. Discuss with students the reasons for any inappropriate actions or reactions. Use the round table whisper person-to-person game.</p> <ol style="list-style-type: none"> 2. Demonstrate and have students use a pager, cell phone and fax machine, send an e-mail and take a written telephone message.
<p>Objective 4 Discuss the pros and cons of leasing, renting and purchasing office equipment.</p> <p>A. Service contract, agreement between the physician's office and service company to inspect and care for specific piece of equipment.</p> <p>B. Lease contract on equipment</p> <ol style="list-style-type: none"> 1. Outlines conditions for use of the equipment with monthly payments for a set period of time. 2. Option to purchase, upgrade to latest model, or cancel and return at end of lease. <ol style="list-style-type: none"> a. Advantages <ol style="list-style-type: none"> 1) Leasing equipment that requires excessive use, needs to be replaced frequently or requires costly repairs saves money in the long run. 2) Leasing technical equipment that needs to be frequently updated also saves money in the long run. 3) Initial cost may require less cash up front. 4) May be used as a depreciation tax deduction. b. Disadvantages <ol style="list-style-type: none"> 1) Practice does not own equipment. 2) Lower interest rates. 3) Equipment cannot be sold. 4) May be more expensive than buying over a period of time. <p>C. Rent is paid as monthly payment in order to use the equipment. No tax benefits are accrued.</p> <p>D. Purchase is immediate or made in agreed upon payments ending in ownership of equipment. This has</p>	<p>A. Lecture/Discussion B. Assigned Reading</p>

<p>a tax benefit through depreciation.</p> <p>E. Warranty</p> <ol style="list-style-type: none"> 1. Guarantee by manufacturer to replace or fix product. 2. Length of time for the warranty is usually one year unless purchased for longer. 3. Manufacturer able to contact owner if deficiencies with product. 4. Exclusions. 	
<p>Objective 5 Assess the ergonomic environment in a facility.</p> <ol style="list-style-type: none"> A. Applied science concerned with safety and efficiency of equipment used by people. B. Identify correct ergonomic furniture and equipment <ol style="list-style-type: none"> 1. Chair height and size. 2. Desk or counter-top level. 3. Equipment placement. C. Discuss the recommendations to prevent injuries <ol style="list-style-type: none"> 1. Head and neck upright. 2. Objects within reach. 3. No body extension. 4. Thighs parallel and legs perpendicular to floor. 5. Moves made from side to side instead of twisting. 6. Telephones with headsets. 7. Lifts at waist level when possible. 8. Load kept light, additional trips made if needed. 9. Place computer monitor just below eye level and at arm's distance. D. Injuries result from cumulative trauma to nervous or musculoskeletal system also known as RSI. 	<ol style="list-style-type: none"> A. Lecture/Discussion B. Assigned Reading C. Using an office environment space and equipment activity sheet, have students arrange the items you list to design the reception area. Use graph paper. D. Contact Occupations Safety and Health Administration (OSHA) via internet exercise for ergonomic guidelines. www.osha.gov
<p>Objective 6 Prepare an inventory of required equipment and supplies used within an administrative office setting.</p> <ol style="list-style-type: none"> A. Equipment. B. Administrative supplies. 	<ol style="list-style-type: none"> A. Lecture/Discussion B. Assigned Reading C. Compare inventories and discuss the differences.
<p>Objective 7 Analyze the steps to complete a purchase order.</p> <ol style="list-style-type: none"> A. Budget. B. Immediate needs. C. Long-term needs. D. Chain of command to approve order. E. Place order by: <ol style="list-style-type: none"> 1. Telephone. 2. Written request. 3. Internet. 	<ol style="list-style-type: none"> A. Lecture/Discussion B. Assigned Reading

<p>Objective 8 Explain the impact of the Americans with Disabilities Act (ADA) on the physical structure of the office.</p> <ul style="list-style-type: none"> A. Identify patients with disabilities <ul style="list-style-type: none"> 1. Visual impairment. 2. Hearing impairment. 3. Physical disabilities. 4. Obesity. 5. Hearing impairment. 6. Diminished mental capacity. 7. Age. B. Identify types of special needs <ul style="list-style-type: none"> 1. Wheelchairs. 2. Portable oxygen tanks. 3. Walkers or canes. 4. Emergencies <ul style="list-style-type: none"> a. Biohazard container. b. Crash cart. c. Standard precautions. d. Sharps container. C. List adaptations for workers with special needs. D. List adaptations for patients with special needs. 	<ul style="list-style-type: none"> A. Lecture/Discuss B. Assigned Reading
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