

## MEDICAL OFFICE SERIES

<b>Code No.</b>	<b>Class Title</b>	<b>Occ. Area</b>	<b>Work Area</b>	<b>Prob. Period</b>	<b>Effective Date</b>	<b>Last Action</b>
4960	Medical Office Assistant	04	445	6 mo.	07/15/12	New
4961	Medical Office Associate	04	445	6 mo.	07/15/12	New
4962	Medical Office Specialist	04	445	6 mo.	07/15/12	New
4963	Medical Office Coordinator	03	441	6 mo.	07/15/12	New

### *Promotional Line: 238/298*

#### Series Narrative

Employees in this series provide a range of both patient related support functions and non-medical support services in an assigned health care unit or other health care facility providing patient services. They apply knowledge of policies and procedures used regarding patient insurance, billing and account maintenance, and collections. They serve as an essential link between the assigned health care unit and various services and staff.

Employees typically:

1. perform reception/call center duties, including scheduling of patient appointments
2. interview patients to obtain demographic information and orient them to the services, policies, and/or procedures of the facility
3. review, look-up, update, and maintain medical records as required
4. perform billing and cashiering duties
5. operate data entry equipment and other auxiliary equipment
6. establish and maintain effective public relations with patients and their families in regards to non-medical services provided by the clinic, and
7. at the upper levels, counsel patients regarding their accounts and supervise lower level staff and/or manage the activities of the patient services areas of the clinic.

#### DESCRIPTIONS OF LEVELS OF WORK

##### **Level I: Medical Office Assistant**

**4960**

##### **Previous classes—Ambulatory Care Aide I, Patient Unit Clerk I**

Employees at this level are responsible for performing a variety of routine clerical duties in order to provide quality patient care in a health care facility. They receive on the job training and detailed instructions in order to perform patient-related clinical activities. They work under direct supervision from a designated supervisor.

A Medical Office Assistant typically –

1. performs clinic reception duties, including greeting patients, answers, screens and routes telephone inquiries, scheduling call in and out-patient clinic appointments in accordance with clinic guidelines; opens and distributes mail; transmits correspondence and medical records by mail, e-mail, or fax
2. checks in patients; assembles and prepares patient information forms and assists with the completion of these forms (such as release of information and signature authorization forms); assists with the discharge of patients by completing forms; completes insurance and other claim forms
3. assists in the creation and/or maintenance of files and records for the unit (such as patient files, financial files, and patient directories); locates or monitors the location of medical charts; prepares reports (such as census reports, unit status); establishes new files and maintains existing files; maintains medical records, technical library, and correspondence files
4. performs data entry entering patient information into the computerized patient care systems (e.g., electronic medical records, automated billing, electronic lab, x-ray systems, pharmacy systems, etc.), and assuring accuracy of data entered for insurance/demographic information only
5. operates office equipment such as copiers, voice mail messaging systems, and uses word processing, spreadsheet, and other software applications to prepare reports, invoices, financial statements, letters, case histories and medical records
6. communicates routine information to the patient (such as instructions on how to operate the telephone or television); escorts patients to their assigned rooms
7. orders clerical supplies
8. maintains clean waiting room area conditions; maintains nurse's station to meet IDPH work environment standards
9. performs other related duties as assigned

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**Level II: Medical Office Associate****4961****Previous classes—Ambulatory Care Aide II, Patient Unit Clerk II**

Employees at this level are capable of dealing with normal clerical duties in several patient-service areas of a clinic. They may function independently in a separate patient clinic. They work under general supervision from higher level personnel.

A Medical Office Associate typically –

1. enters, codes, verifies, stores, and retrieves information concerning a patient's medical record either manually or via the electronic medical record (EMR) or other computer information system; compiles and records medical charts, reports, correspondence, and insurance information using computer system

2. generates patients charge tickets with responsibility for retrieval and accuracy of information; applies correct charges for professional service indicated by the physicians; collects co-payments at the time of service
3. prepares deposit monies, daily receipt log and cash reconciliation sheet at the end of each day; closes out cash register, credit card, and/or other payment receiving systems
4. informs new patients of institutional and/or unit billing/payment/insurance procedures and guidelines
5. responds to routine questions from patients and their families, visitors and medical staff
6. orders clerical supplies
7. advises supervisor of any safety problems concerning unit
8. monitors work completed and alerts superiors to problems that may occur; provides input to supervisors and/or administration regarding the needed changes in reception area; may assist in the training of individuals at the lower level of this series or other clerical staff
9. inspects equipment such as mechanical delivery systems, office machines, and reports malfunctions to appropriate persons; carries out manual procedures
10. establishes, maintains, and updates files and/or records for unit (such as patient medical records, patient financial files, patient directories, and activity summaries)
11. operates office equipment such as voice mail messaging systems, and uses word processing, spreadsheet, and other software applications to prepare reports, invoices, financial statements, letters, case histories and medical records
12. performs duties at the lower level of this series
13. performs other related duties as assigned

**Level III: Medical Office Specialist****4962****Previous classes—Ambulatory Care Assistant, Patient Unit Manager**

Employees at this level provide patients with a broad range of complex, individualized clerical services. They may function as lead workers or may function independently in a clinical unit. They work under general supervision from higher level personnel.

An Medical Office Specialist typically –

1. works independently, maintaining and overseeing all aspects of the reception area to ensure smooth clinic activity flow; evaluates clerical procedures in the patient unit in order to identify need for rescheduling routine activities in order to prevent peak work load periods
2. registers and enters patient registration into the computerized patient care system in accordance with established policies and procedures

3. coordinates patients' appointment schedules (e.g., contacts patients to confirm appointments, set up return appointments); mails new information to new patients containing directions, appointment confirmations, and required releases
4. initiates and retrieves medical records (such as emergency room sheets and x-rays) and other source documents either manually or with a computer
5. initiates, reviews, and monitors clinic service billing to ensure accuracy, completeness, and timeliness
6. assists in the supervision of student workers, other clerical staff in the clinical unit, and those at the lower level of this series; assigns work priorities according to established schedule or adjusting them as needed
7. accepts patient payments and maintains necessary receipt logs; may be responsible for balancing cash drawers/registers
8. establishes and maintains effective procedures for obtaining and maintaining patient unit supplies and equipment; maintains inventory of equipment and/or supplies; prepares reports as requested by superiors
9. assists in possible changes in current operating procedures or suggests the development of new ones; keeps staff informed of any additions/deletions/changes in operating procedure/policies in the clinic
10. serves as a liaison between reception and auxiliary personal (medical records, laboratory, x-ray, other clinics, and billing/collections)
11. responsible for maintaining a satisfactory physical environment in the patient unit such as ensuring that equipment is properly placed
12. monitors work flow; trains new staff; is responsible for training permanent, temporary, and back-up coverage in all phases of reception work
13. verifies external referrals to the health care facility
14. attends informational meetings/seminars for further education on behalf of the reception unit
15. performs duties at the lower level of this series
16. performs other related duties as needed or assigned

**Level IV: Medical Office Coordinator****4963**

**Previous classes—Ambulatory Care Supervisor, Ambulatory Care Manager, Patient Support Services Coordinator**

Employees at this level manage and coordinate on-site activities and personnel in addition to counseling patients with patient account problems. They manage and coordinate the operation of a clinical facility in accordance with policies and standards of performance. They work under the direction of a medical director and/or departmental administrator

An Medical Office Coordinator typically –

1. directly supervises non-clinical support staff assigned to a division, including responsibility for screening, hiring, orienting, evaluating, disciplining, training, ensuring staff compliance with policy and procedures, and updating position descriptions
2. develops and/or assists superiors in the development of unit operating procedures and guidelines; ensures proper implementation of procedures and guidelines by support staff; maintains and updates procedures manuals
3. participates in clinical staff orientations, and coordinates or conducts ongoing staff development programs
4. plans and arranges work schedules for assigned personnel, including vacation usage and coverage for unplanned absenteeism
5. serves as a liaison for unit and other auxiliary personnel (such as medical records, laboratory, or billing and collections); resolves any problems or deficiencies as they occur
6. conducts and administers fiscal operations, including accounting, planning budgets, authorizing expenditures, establishing rates for services, and coordinating financial reporting; justifies budgetary needs for staff, equipment, and supplies
7. verifies and submits all necessary payroll data for assigned personnel on a timely basis
8. assists patients who have problem accounts and/or delinquent accounts; sets up preliminary pay schedules when appropriate; refers patients with complex account problems and/or severely delinquent accounts to superiors or to other staff, as designated
9. investigates and follows up on special account actions; completes necessary forms and records and forwards to appropriate offices (such as refunds, write-offs, or adjustments)
10. establishes and maintains contact with appropriate third party payer agencies for referral purposes; processes related forms and maintains appropriate follow up
11. ensures that all equipment is present and functioning in appropriate locations prior to and during use; responds to emergency requests from medical and nursing staff during surgical procedure or treatment
12. maintains communication between governing boards, medical staff, and department heads by coordinating interdepartmental functioning; provides liaison between departments to arrange for and coordinate necessary support services
13. monitors the completion of patient charge tickets; audits for proper coding and pricing
14. manages the needs of students and supervisors of other clinics as necessary (assisting supervisors with new systems and informing them of all new procedures as they are developed for the clinic and assisting them with integration of the new systems into their schedules)

15. assists the clinic director in developing and implementing policy and procedures for all persons involved in providing assistance to the clinic clients
16. registers patients in accordance with prescribed policies and procedures as needed
17. operates computerized patient care systems and auxiliary equipment as required
18. performs other related duties as assigned
19. inspects all assigned locations, ensuring safety, cleanness, appropriate levels of supplies, and properly functioning equipment
20. provides support to physicians, nurses, reception and referral staff, and patients to ensure quality and efficient patient processing and care
21. gathers and maintains statistical data for administrative reports, clinic utilization statistics, utilization reviews, Food & Drug Administration, and The Joint Commission regulations, and patient charges
22. secures and maintains current product information and price lists from outside vendors to ensure cost containment; submits and tracks orders as appropriate
23. conducts fiscal inventory of supplies, equipment and furnishings; maintains records to document changes in that inventory
24. supervises office personnel in health care facility areas such as patient registration, transcription, immunization compliance, insurance and bursar billing, switchboard, customer service, information desk, and patient medical information including and not limited to medical release of information
25. counsels and provides personal assistance to patients regarding account status, financial policies and procedures; responds to non-routine, complex questions and/or hospital support services; advises physicians and other staff of special problems or needs of patients as required
26. develops operating procedures and guidelines for reception and referral personnel; creates, maintains, and updates procedure manuals; ensures proper development and implementation of procedures and guidelines by support staff
27. serves as department liaison for problem resolutions with other departments
28. may register patients in accordance with prescribed policies and procedures when necessary
29. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:**Level I: Medical Office Assistant****4960****Previous classes—Ambulatory Care Aide I, Patient Unit Clerk I**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school diploma or equivalent/GED

## KNOWLEDGE, SKILLS, AND ABILITIES (KSAs)

1. Knowledge of administration and clerical procedures and systems such as word processing, managing files, and records, etc.
2. Knowledge of customer and personal service
3. Written and oral communication skills
4. Basic computer skills
5. Ability to effectively communicate with staff members throughout the hospital, patients and families, and volunteers and students
6. Ability to work under pressure and amid interruptions
7. Ability to read, comprehend and follow complex instructions
8. Ability to work with persons from a variety of cultural, economic and educational backgrounds
9. Data entry ability
10. Ability to perform simple calculations (e.g., adding, subtracting, and totaling)

**Level II: Medical Office Associate****4961****Previous classes—Ambulatory Care Aide II, Patient Unit Clerk II**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school diploma or equivalent/GED
2. Any one or any combination of the following, totaling **one (1) year (12 months)**, from the categories below:
  - a) work experience comparable to that performed at the Medical Office Assistant level or in other positions of comparable responsibility
  - b) work experience in a health care facility such as a doctor's, dentist's or hospital's office; which involved record keeping; working with the public, direct patient contact, answering telephones and working with medical terminology

- c) graduation from an accredited medical secretarial or paramedical program (such as nursing assistant, medical assistant or medical secretary)

**KNOWLEDGE, SKILLS AND ABILITIES (KSAs)**

1. Working knowledge of medical terminology
2. Knowledge of computers and data entry
3. Skill in reading, comprehending and following complex instructions
4. Organization skills, including time management and work flow
5. Oral and written communication skills
6. Ability to interact with and assist patients and their families
7. Ability to adapt and work under pressure and amid interruptions
8. Ability to work with people from a variety of cultural economic and educational backgrounds
9. Ability to use a medical dictionary
10. Ability to keep patient information confidential
11. Ability to perform routine keyboarding accurately
12. Ability to establish priorities and function independently
13. Ability to lift 15 pounds of medical records
14. Ability to perform simple calculations (such as adding, subtracting, and totaling)
15. Ability to function as a part of a team

**Level III: Medical Office Specialist****4962****Previous classes—Ambulatory Care Assistant, Patient Unit Manager****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. High school diploma or equivalent/GED
2. Any one or any combination of the following, totaling **two (2) years (24 months)**, from the categories below:
  - a) work experience comparable to that performed at the Medical Office Associate level or in other positions of comparable responsibility



- b) college education with coursework in a medical or para-medical field (such as nursing assistant, medical assistant or medical secretary) and/or business field (such as business, finance, computer science, public administration, or social science)

- 30 semester hours equals 6 months
- 60 semester hours equals 1 year (12 months)
- 90 semester hours equals 2 years (24 months)

and

work experience in a medical or para-medical fields (such as nursing assistant, medical assistant or medical secretary)

#### KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of medical terminology
2. Knowledge of medical records and operating procedures
3. Knowledge of medical laboratory and x-ray, billing, and admissions procedures
4. Knowledge of computer system and clinic forms
5. Knowledge of automated admissions and/or billing systems
6. Skill in maintaining detailed records
7. Skill in communicating effectively with patients and families from a wide variety of persons from different economic and cultural backgrounds
8. Oral and written communication skills
9. Organization skills, including time management and work flow
10. Skill in adapting and working under pressure and amid interruptions
11. Skill in explaining rules, policies and their interpretations
12. Ability to use a medical dictionary
13. Data entry ability with great attention to detail
14. Ability to supervise, train, lead and direct the work of others
15. Ability to add, subtract, work with percentages, and perform cash transactions effectively
16. Ability to establish and maintain working relationships with medical staff
17. Ability to keep patient data confidential

18. Ability to use independent judgment and resolve problems quickly
19. Ability to identify work priorities and follow them to complete daily tasks
20. Ability to be stable and maintain cooperative working relationships with clerical and professional staff

**Level IV: Medical Office Coordinator****4963****Previous classes—Ambulatory Care Supervisor, Ambulatory Care Manager, Patient Support Services Coordinator**

## CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school diploma or equivalent/GED
2. a) **Five (5) years (60 months)** of hospital clerical experience or ancillary service experience **three (3) years (36 months)** of which must have included the performance of responsible non-clinical services auxiliary to the operations of a patient unit  
  
or  
  
b) College education with course work in a business medical, or para-medical field may be substituted for up to **three (3) years (36 months)** of the required experience with a minimum experience requirement of **two (2) years (24 months)** of experience in the performance of responsible non-clinical service auxiliary to the operating of a patient unit
  - 30 semester hours equals 6 months
  - 60 semester hours equals 1 year (12 months)
  - 90 semester hours equals 2 years (24 months)
  - 120 semester hours or higher equals 3 years (36 months)

## KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of registration and billing procedures
2. Knowledge of third party payer reimbursement, disability claim forms, and insurance billing regulations
3. Knowledge of accounting principles and insurance claims filings and reimbursements
4. Knowledge of computer system and clinic forms
5. Knowledge of automated admissions and/or billing systems
6. Knowledge of medical terminology
7. Knowledge of various hospital and/or clinic departmental services
8. Knowledge of hospital pre-admission and admission procedures

9. Skill in maintaining detailed records
10. Skill in communicating effectively with patients and families from a wide variety of persons from different economic and cultural backgrounds
11. Oral and written communication skills
12. Organization skills, including time management and work flow
13. Skill in explaining rules, policies and their interpretations
14. Skill in interviewing patients who have a variety of financial problems
15. Skill in interpreting and implementing procedures, guidelines, and policies
16. Skill in developing reports and analyzing data
17. Skill in adapting and working under pressure and amid interruptions
18. Ability to supervise, train, lead and direct the work of others
19. Ability to interpret policies, procedures, and guidelines
20. Ability to interpret a variety of financial, diagnostic, and internal codes
21. Ability to establish and maintain cooperative working relationships with individuals and agencies internal and external to the unit and/or institution
22. Ability to solve problems related to intake, accounting, receptions, and patient relations
23. Ability to work with the media to create advertising and markets plans
24. Ability to keep patient data confidential
25. Ability to interpret policies, procedures, and guidelines
26. Ability to interpret a variety of financial, diagnostic, and internal codes
27. Ability to use independent judgment and resolve problems quickly
28. Ability to identify work priorities and follow them to complete daily tasks