Experiential Learning Portfolio for 10160143 Medical Office Procedures and Customer Service

Student Contact Information:

Name:_____Student ID#_____

Email: _____Phone:_____

It is highly recommended that you speak with the Academic Dean or instructor who teaches this course prior to completing a portfolio.

Before attempting to complete this portfolio, the following prerequisites and/or corequisites must be met:

Directions

Consider your prior work, military, volunteer, education, training and/or other life experiences as they relate to each competency and its learning objectives. Courses with competencies that include speeches, oral presentations, or skill demonstrations may require scheduling face-to-face sessions. You can complete all of your work within this document using the same font, following the template format.

1. Complete the Student Contact Information at the top of this page.
2. Write an Introduction to the portfolio. Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.
3. Complete each "Describe your learning and experience with this competency" section in the space below each competency and its criteria and learning objectives. Focus on the following:
   * What did you learn?
   * How did you learn through your experience?
   * How has that learning impacted your work and/or life?
4. Compile all required and any suggested artifacts (documents and other products that demonstrate learning).
   * Label artifacts as noted in the competency
   * Scan paper artifacts
   * Provide links to video artifacts
   * Attach all artifacts to the end of the portfolio
5. Write a Conclusion for your portfolio. Briefly summarize how you have met the competencies.
6. Proofread. Overall appearance, organization, spelling, and grammar will be considered in the review of the portfolio.
7. Complete the Learning Source Table. Provide additional information on the business and industry, military, and/or volunteer experiences, training, and/or education or other prior learning you mentioned in your narrative for each competency on the Learning Source Table at the end of the portfolio. Complete this table as completely and accurately as possible.

The portfolio review process will begin when your completed portfolio and Credit for Prior Learning Form are submitted and nonrefundable processing fees are paid to your local Credit for Prior Learning contact. Contact Student Services for additional information.

Your portfolio will usually be evaluated within two weeks during the academic year; summer months may be an exception. You will receive an e-mail notification regarding the outcome of the portfolio review from the Credit for Prior Learning contact. NOTE: Submission of a portfolio does not guarantee that credit will be awarded.

You have 6 weeks to appeal any academic decision. See your student handbook for the complete process to appeal.

To receive credit for this course, you must receive "Met" on 6 of the 8 competencies.

10160143 Medical Office Procedures and Customer Service, 2 Associate Degree Credits

Course Description: This course develops professional skills and attitudes needed in a medical business environment. Skills developed include an ability to communicate effectively with patients and other medical office staff, manage time effectively, schedule patients, greet patients, use the telephone properly, process mail, apply ergonomics and office safety, and use medical computer software efficiently.

> **Introduction: Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.**

Competency 1: Explain the role of the MAS/MOS in a health-related organization

Criteria: Performance will be satisfactory when:

- learner lists possible job settings available to medical administrative specialists
- learner lists tasks that are performed by a medical administrative specialist
- learner lists allied health workers and their main job duties
- learner identifies the relationships between the MAS professional and other roles in the health-related organization

Learning Objectives:

a. Identify a variety of health organizations
b. Explain the expanding role of the medical administrative specialist and medical office specialist
c. Discuss the basic job responsibilities of the medical administrative specialist and medical office specialist positions
d. Explain the importance of maintaining successful interoffice relationships
e. Distinguish among different types of doctors and medical practices

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 2: Explain medical office policies including practicing confidentiality of client information

Criteria: Performance will be satisfactory when:

- learner summarizes general office policies
- learner addresses the legal implications associated with confidentiality of patient and medical records
- learner addresses how confidentiality is maintained with the use of computerized medical records

Learning Objectives:

a. Discuss what office policies are and why they are implemented
b. Define confidentiality and why it is important in the medical profession
c. Discuss HIPAA guidelines as it would apply to the office policies
d. Review medical documentation as legal document
e. Explain the role of confidentiality and security in regard to the medical record, both written and electronic
f. Practice confidentiality of client information
g. Discuss the importance of various office safety policies
h. Identify ways to implement office ergonomics policies

Required Artifacts: None
Suggested Artifacts: HIPAA training certificate/documentation

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 3: Demonstrate professional behavior as a member of the healthcare team
Criteria: Performance will be satisfactory when:
- response demonstrates a positive attitude
- response demonstrates ethical, moral, and confidentiality
- response demonstrates characteristics of dependability and responsibility within a team
- response demonstrates a professional image
- response demonstrates time management techniques
- response demonstrates problem solving

Learning Objectives:
a. Project a positive attitude
b. Perform within ethical boundaries
c. Maintain confidentiality
d. Work as a team member
e. Demonstrate problem solving abilities
f. Demonstrate time management techniques

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 4: Create written business communication

Criteria: Performance will be satisfactory when:
- learner identifies functions of a mail room
- learner identifies various shipping methods through a written or oral assessment
- learner creates a business documents
- learner identifies proper procedures for creating and sending a fax properly
- learner identifies methods of processing incoming mail

Learning Objectives:
a. Discuss the operation of a mail room
b. Contrast the various methods of shipping mail
c. Process incoming mail
d. Compose a business letter
e. Compose a business email
f. Send a fax properly

Required Artifacts: None
Suggested Artifacts: Sample documents (business letter, email, fax).

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 5: Use proper telephone techniques for the medical office
Criteria: Performance will be satisfactory when:
- learner demonstrates the correct technique (e.g. including proper etiquette) to use when answering the telephone for a medical practice
- learner demonstrates the use of answering, transferring, holding and managing several incoming and outgoing calls
- learner demonstrates taking a message from a patient and correctly documenting the information
- learner demonstrates how a breach of patient confidentiality can be avoided when using the telephone
- learner demonstrates the role of answering machines, answering services, pagers, and electronic mail in the medical office
- learner examines telephone directories as a reference source
- learner demonstrates monitoring incoming calls according to procedures

Learning Objectives:
a. Enumerate the principles of good telephone etiquette
b. Discuss answering, transferring, holding, and managing all calls
c. Monitor incoming calls according to procedures
d. Discuss the procedures for taking messages and follow up
e. Discuss the procedures for placing outgoing calls
f. Explain the use of telephone directories as reference sources
g. Explain the various features of telephone technology and services

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 6: Create patient and physician office schedules
Criteria: Performance will be satisfactory when:
- learner demonstrates the proper steps in scheduling
- learner maintains physician schedules according to patient needs
- learner demonstrates entering appointments in practice management software
- learner demonstrates canceling appointments appropriately in medical office
- learner demonstrates management of physician schedule according to guidelines and priorities
- learner demonstrates written or oral response of different types of scheduling
- learner demonstrates identifying critical information required for scheduling patient admission and/or procedures

Learning Objectives:
a. Explain the steps in scheduling
b. Discuss the types of scheduling
c. Set up an appointment schedule
d. Identify critical information required for scheduling patient admission and/or procedures
e. Manage appointment schedule, using established priorities
f. Use medical scheduling software
g. Implement time management principles to maintain effective office function.

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 7: Integrate principles of customer service in the healthcare setting

Criteria: Performance will be satisfactory when:
- learner demonstrates identification of both internal and external healthcare customers
- learner demonstrates focusing on effective customer communication
- learner demonstrates determining responsive methods to identify and meet customer needs
- responses effectively follow procedures to customer follow-up
- responses to scenarios identify cultural health beliefs and design effective methods to meet the needs of the diverse customer

Learning Objectives:
a. Identify both internal and external healthcare customers
b. Discuss effective customer communication
c. Identify effective methods to meet the needs of the diverse customer
d. Determine responsive methods to identify and meet customers' needs
e. Demonstrate effective customer follow-up procedures

Required Artifacts: None
Suggested Artifacts: training/certificate

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 8: Perform front office tasks using medical software

Criteria: Performance will be satisfactory when:

- learner performs patient registration according to established guidelines utilizing practice management software
- learner creates professional communication for patients and medical staff that are appropriate for given scenario
- learner accurately completes necessary forms for front office workflow that are appropriate for given scenario

Learning Objectives:

a. Register a patient
b. Search for a patient record
c. Schedule an appointment
d. Prepare patient paperwork
e. Modify patient information and demographics accurately
f. Prepare a scheduling matrix according to established guidelines
g. Create an appointment reminder letter
h. Compose professional communication for patients and medical assistant staff
i. Complete all forms necessary for the front office workflow

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Conclusion: Summarize how you have met the competencies of the course.

Learning Source Table

Learning Source (name of employer, training, military, volunteer organization, etc.)	Supervisor	Start-End Date	Total Hours	Related Competencies
Ex: XYZ Corporation	Bucky Badger	8/2012-9/2014	2000	#1, 2, 3, and 7