

COURSE OUTLINE **Computerized Medical Office Management**

Course Description

BE 126. Computerized Medical Office Management. 3 hours credit. Prerequisite: AH 201 with a C or better or concurrent enrollment. Requirement: Before enrolling in the course, the student should be competent in basic computer operation. This course will enable the student to use a computerized account and medical management recordkeeping software program.

Course Relevance

The applications learned in this course will give the student a general knowledge of how to operate medical management software. The complexity of recordkeeping in health care facilities increases continuously, and many providers have turned to computer programs to help maintain patient files, store treatment information, match diagnosis codes with treatment procedures and charges, and perform related tasks.

Required Materials

Gartee, R. (2008) *The medical manager, student edition, version 10.31* (1st ed.), Albany, NY: Delmar Publishers.

Learning Outcomes

The intention is for the student to be able to

1. Demonstrate computerized medical account management software skills

Learning PACT Skills that will be DEVELOPED and/or documented in this course

Through the student's involvement in this course, he/she will develop his/her ability in the following PACT skill areas:

Analytical Thinking Skills

1. Critical Thinking
 - Through applying skills learned in the textbook and classroom presentations, the student will solve specific problems using computerized account management software.

Technology Skills

2. General Computer Use
 - Through using account management software, the student will develop computer competencies.

Major Summative Assessment Task(s)

These learning outcomes and the Learning PACT skills will be demonstrated by

1. Completing a final project that demonstrates computerized medical account management skills

Course Content

- I. Themes – Key recurring concepts that run throughout this course:
 - A. Proper use of account management software
 - B. Personal development skills
- II. Issues – Key areas of conflict that must be understood in order to achieve the intended outcome:
 - A. Reading comprehension
 - B. Following instructions
 - C. Completing tasks to the degree of approval
- III. Concepts – Key concepts that must be understood to address the issues:
 - A. Medical office infrastructure
 - B. Medical management software
 - C. Changes in the health care industry
- IV. Skills/Competencies – Actions that are essential to achieve the course outcomes:
 - A. Demonstrate a basic understanding of today's medical office
 1. Describe the flow of information in a medical office
 2. Explain why the appointment schedule is important
 3. Name the items of information required for entry of an appointment
 4. Define the term overbooking
 5. Discuss the function of a superbill
 6. Describe three methods of collecting insurance payments
 7. Name and describe three types of health insurance plans
 8. Discuss the role of computers in today's medical office
 9. Describe the purpose of The Medical Manager account management software
 - B. Demonstrate the use of the basic features of The Medical Manager account management software
 1. Start the Medical Manager software program
 2. Input and process data required for the support files
 3. Print reports from the support files
 4. Back up the daily data files
 5. Describe the purpose and value of a variety of software functions
 - C. Demonstrate how to build patient file
 1. Enter patient account information
 2. Enter data into supplemental screens
 3. Discuss the importance of inputting data correctly
 4. Describe the relationship of the guarantor and the patient
 5. Explain the relevance of extended information
 - D. Demonstrate how to post entries
 1. Retrieve patient accounts
 2. Post procedure codes and diagnosis codes under varying circumstances
 3. Run the daily report
 4. Name three components of the daily report
 5. Explain the process of posting accounts
 6. Describe the Help function
 7. Modify or correct an account

- E. Demonstrate how to schedule appointments
 - 1. Schedule and cancel individual and multiple appointments
 - 2. Make follow up appointments from superbills
 - 3. Print a daily list of appointments
 - 4. Enter hospital rounds report
 - 5. Print hospital rounds report
 - 6. Explain the procedure for scheduling appointments
 - 7. Discuss the purpose and importance of the daily list of appointments
 - 8. Explain the (J)ump command
 - 9. Discuss the importance of the hospital rounds report
 - 10. Explain how the hospital rounds report can be used in place of a superbill for posting purposes
- F. Demonstrate practice management
 - 1. Describe why insurance billing is important
 - 2. Prepare an insurance billing worksheet
 - 3. Print claim forms for insurance companies
 - 4. Post payments from patients
 - 5. Post payments from insurance carriers
 - 6. Make posting adjustments from the Procedure Entry screen
 - 7. Make posting adjustments from the Payment Entry screen
 - 8. Advance the date
 - 9. Interpret the information on an insurance billing worksheet
 - 10. Explain why an insurance billing worksheet should be prepared in advance of billing
 - 11. Describe why the system date should not be advanced
 - 12. Locate and interpret information from an insurance company's Explanation of Benefits
 - 13. Describe the information to be processed at each portion of the Payment Entry screen
 - 14. Explain what is meant by a deductible
 - 15. Explain what primary and secondary insurance means
 - 16. Discuss the term dual insurance coverage
- G. Demonstrate report generation
 - 1. Describe the function of the Current Period Report
 - 2. Print the Guarantor Report
 - 3. Print the Current Period Report
 - 4. Describe the function of the System Summary Report
 - 5. Explain several methods for billing patients on a regular basis
 - 6. Print patient statements
- H. Demonstrate a basic understanding of the advanced function of The Medical Manager
 - 1. Discuss three unique payment situations and describe how each situation should be handled
 - 2. Post a variety of unique payments
 - 3. Discuss the account aging process
 - 4. Name and discuss several types of patient data that can be retrieved and

- displayed
- 5. Display and print patient data
- 6. Explain the purpose and importance of a period close and purge
- I. Demonstrate a basic understanding of some of the changes taking place in the health care industry
 - 1. Describe the importance of information systems in a future medical office
 - 2. Explain how computers will assist offices with changes in health care
 - 3. Define the term managed care
 - 4. Describe three new types of health care organizations
 - 5. Discuss the clinical aspects of the future office
 - 6. Discuss the role of computers in communicating medical information
 - 7. Describe additional modules of The Medical Manager system and how they interrelate

Learning Units

- I. Today's medical office
 - A. Flow of information in a medical office
 - B. Insurance payments
 - C. Role of computers in today's medical office
 - D. The Medical Manager software
- II. Using the Medical Manager
 - A. Starting up the Medical Manager
 - B. The Medical Manager window
 - C. Navigating The Medical Manager software
 - D. Special keys for entering or editing data
 - E. The main menu
 - F. Exiting and reentering
 - G. The Medical Manager software
 - H. The file maintenance menu
 - I. The point and select feature
 - J. Entering referring doctor information
- III. Building Your patient file
 - A. New patient entry
 - B. Guarantor information
 - C. Additional screens
- IV. Posting your entries
 - A. Procedure entry
 - B. Retrieving an account
 - C. Posting an account
 - D. Posting ailment details
 - E. Printing daily reports
 - F. Editing prior entries

- V. Office management/appointment scheduling
 - A. Making and canceling appointments
 - B. Daily list of appointments
 - C. Entering and printing
 - D. Hospital rounds and reports
 - E. Finding procedure codes for hospital visits
 - F. Advancing the date

- VI. Practice management
 - A. Billing routines
 - B. Insurance billing worksheet
 - C. Insurance billing process
 - D. Posting payments and adjustments

- VII. Report generation
 - A. Types of reports
 - B. Reference list of options available
 - C. For guarantors' financial summary: patient billing
 - D. Reference list of available options for patient statement routines: system utilities
 - E. Reference list of available options for the general ledger/distribution report

- VIII. Advanced functions
 - A. Unique payments
 - B. Aging report
 - C. Display patient data
 - D. Period close and period close with purge

- IX. Tomorrow's medical office
 - A. Managed care
 - B. Multipractice service organizations
 - C. Electronic data interchange
 - D. Electronic medical records

Learning Activities

Learning activities will include correctly completing exercises on medical account management software. Unit tests will be given to test basic knowledge of the medical account management software.

Grade Determination

The student will be graded on learning activities and assessment tasks. Grade determinants may include the following: daily work, quizzes, chapter or unit tests, comprehensive examinations, student projects, student presentations, class participation, and other methods of evaluation employed at the discretion of the instructor.