

## TEMA 1020 - Medical Office I (2 Credits)

### Course Description

The Medical Office I course introduces administrative and general duties in a medical office. These duties include appointment scheduling, records management, electronic health records use and management, written communications, health insurance, office equipment and management, as well as telephone procedures. This course will provide hands-on practice of administrative skills and competency-based examinations.

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### Course Objectives

- Demonstrate professionalism and responsibilities of the medical assistant through written, verbal, and electronic communication.
  - Describe the administrative functions of a medical office.
  - Demonstrate correct documentation in a medical record.
  - Define types of information contained in a patient's medical record.
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### Course Outline

- Telephone and Written Communications
- Office Environment
- Scheduling Appointments
- Medical Record and Documentation

## Assignments and Assessments

Welcome  
Orientation  
Syllabus and Course Agreement  
Course Timeline  
Read: Chapter 19 Telephone Communications  
PowerPoints: Chapter 19 Telephone Communications  
Telephone Communications Concept Check  
Check Your Understanding: Chapter 19 Telephone Communications  
Skill - Phone Calls Video  
Skill Reflection 1 - Demonstrate Professional Telephone Techniques  
Skill Reflection 1 - Document Telephone Messages Accurately  
Skill Reflection 1 - Telephone a Patient with Test Results  
Skill Reflection 2 - Demonstrate Professional Telephone Techniques  
Skill Reflection 2 - Document Telephone Messages Accurately  
Skill Reflection 2 - Telephone a Patient with Test Results  
Skill Reflection 3 - Demonstrate Professional Telephone Techniques  
Skill Reflection 3 - Document Telephone Messages Accurately  
Skill Reflection 3 - Telephone a Patient with Test Results  
Demonstrate Professional Telephone Techniques Pass-off  
Document Telephone Messages Accurately Pass-off  
Telephone a Patient with Test Results Pass-off  
Learning Lab: Telecommunications (Chapter 19 Telephone Communications)  
Video Quiz: Telephone Personality (Chapter 19 Telephone Communications)  
Develop a Current List of Community Resources Related to Patients' Health Care Needs  
Quiz: Chapter 19 Telephone Communications  
Flashcards: Chapter 19 Telephone Communications  
Telephone Communications Exam - Requires Respondus LockDown Browser  
Read: Chapter 20 Written Communications  
PowerPoints: Chapter 20 Written Communications  
Written Communications Concept Check  
Skill - Compose Professional Correspondence Utilizing Electronic Technology Video  
Skill Reflection 1 - Compose Professional Correspondence Utilizing Electronic Technology  
Skill Reflection 2 - Compose Professional Correspondence Utilizing Electronic Technology  
Skill Reflection 3 - Compose Professional Correspondence Utilizing Electronic Technology  
Compose Professional Correspondence Utilizing Electronic Technology Pass-off  
Check Your Understanding: Chapter 20 Written Communications

Competency Challenge: Written Communications (Chapter 20 Written Communications)  
Case Study: Responding to a Request for a Consultation (Chapter 20 Written Communications)  
Quiz: Chapter 20 Written Communications  
Business worksheet  
Flashcards: Chapter 20 Written Communications  
Written Communications Exam- Requires Respondus LockDown Browser  
Check point meeting- Module 1  
Read: Chapter 21 The Office Environment  
PowerPoints: Chapter 21 The Office Environment  
The Office Environment Concept Check  
MOSS 21.0 Training: Navigating Menu Systems  
MOSS 21.1 Training: Logging In, Changing Your Password, and Logging Out  
Perform an Inventory of Equipment and Supplies with Documentation  
Check Your Understanding: Chapter 21 The Office Environment  
MOSS 21.1 Assessment: Logging In, Changing Your Password, and Logging Out  
Learning Lab: Written Communications, Computers, and Office Equipment (Chapter 21 The Office Environment)  
Video Quiz: Ergonomics (Chapter 21 The Office Environment)  
Use Proper Ergonomics  
Perform Routine Maintenance of Administrative or Clinical Equipment  
Quiz: Chapter 21 The Office Environment  
Flashcards: Chapter 21 The Office Environment  
The Office Environment, Computers, and Equipment Exam- Requires Respondus LockDown Browser  
Check point meeting- Module 2  
Read: Chapter 22 Scheduling Appointments and Receiving Patients  
PowerPoints: Chapter 22 Scheduling Appointments and Receiving Patients  
Scheduling and Receiving Patients Concept Check  
Patient Registration Video  
MOSS 22.1 Training: Entering New Patient Demographics (Alvarez)  
MOSS 22.2 Training: Entering New Patient Demographics (Bachmayer)  
MOSS 22.3 Training: Entering New Patient Demographics (Lindgren)  
MOSS 22.4 Training: Entering New Patient Demographics (Johnsson)  
MOSS 22.5 Training: Updating Established Patient Demographics (Blomquist)  
MOSS 22.6 Training: Updating Established Patient Demographics (Costa)

MOSS 22.7 Training: Generating an Appointment Reference Sheet  
MOSS 22.8 Training: Scheduling a New Patient Appointment (Alvarez)  
MOSS 22.9 Training: Scheduling a New Patient for Evaluation and In-Office Testing (Lorenzo)  
MOSS 22.10 Training: Scheduling a New Patient for Specialized Care (Weinert)  
MOSS 22.11 Training: Scheduling a New Patient Consultation Appointment (Acuna)  
MOSS 22.12 Training: Scheduling an Established Patient for an Annual Physical Exam (Patel)  
MOSS 22.13 Training: Scheduling an Established Patient for a New Problem (Wolf)  
MOSS 22.14 Training: Scheduling an Established Patient for an Acute Problem (Berger)  
MOSS 22.15 Training: Scheduling Recurring Appointments for an Established Patient (Egger)  
Manage the Appointment Schedule Using Established Priorities  
MOSS 22.16 Training: Creating a Referral (Wolf)  
MOSS 22.17 Training: Sending Clinic Messages and Creating a Referral (Patel)  
MOSS 22.18 Training: Scheduling a Work-in Patient  
MOSS 22.19 Training: Scheduling a Walk-in Patient  
MOSS 22.20 Training: Rescheduling a Patient Appointment  
MOSS 22.21 Training: Canceling a Patient Appointment  
MOSS 22.22 Training: Checking in a New Patient (Alvarez)  
MOSS 22.23 Training: Checking in a New Patient (Acuna)  
MOSS 22.24 Training: Checking in a New Patient (Bachmayer)  
MOSS 22.25 Training: Checking in a New Patient (Johnsson)  
MOSS 22.26 Training: Checking in a New Patient (Lindgren)  
MOSS 22.27 Training: Checking in an Established Patient (Wolf)  
MOSS 22.28 Training: Checking in an Established Patient (Patel)  
MOSS 22.29 Training: Checking in an Established Patient (Costa)  
MOSS 22.30 Training: Checking in an Established Patient (Blomquist)  
MOSS 22.31 Training ADVANCED: Checking in a New Patient (Lorenzo)  
Check Your Understanding: Chapter 22 Scheduling Appointments and Receiving Patients  
Learning Lab: Patient Reception (Chapter 22 Scheduling Appointments and Receiving Patients)  
MOSS 22.1 Assessment: Entering New Patient Demographics (Alvarez)  
MOSS 22.2 Assessment: Entering New Patient Demographics (Bachmayer)  
MOSS 22.3 Assessment: Entering New Patient Demographics (Lindgren)  
MOSS 22.4 Assessment: Entering New Patient

Demographics (Johnsson)  
MOSS 22.5 Assessment: Updating Established Patient Demographics (Blomquist)  
MOSS 22.6 Assessment: Updating Established Patient Demographics (Costa)  
MOSS 22.7 Assessment: Generating an Appointment Reference Sheet  
MOSS 22.8 Assessment: Scheduling a New Patient Appointment (Alvarez)  
MOSS 22.9 Assessment: Scheduling a New Patient for Evaluation and In-Office Testing (Lorenzo)  
MOSS 22.10 Assessment: Scheduling a New Patient for Specialized Care (Weinert)  
Skill - Schedule a Patient Procedure  
Skill Reflection 1 - Schedule a Patient Procedure  
Skill Reflection 2 - Schedule a Patient Procedure  
Skill Reflection 3 - Schedule a Patient Procedure  
Schedule a Patient Procedure Pass-off  
MOSS 22.12 Assessment: Scheduling an Established Patient for an Annual Physical Exam (Patel)  
MOSS 22.13 Assessment: Scheduling an Established Patient for a New Problem (Wolf)  
MOSS 22.14 Assessment: Scheduling an Established Patient for an Acute Problem (Berger)  
MOSS 22.15 Assessment: Scheduling Recurring Appointments for an Established Patient (Egger)  
MOSS 22.16 Assessment: Creating a Referral (Wolf)  
MOSS 22.17 Assessment: Sending Clinic Messages and Creating a Referral (Patel)  
MOSS 22.18 Assessment: Scheduling a Work-in Patient  
MOSS 22.19 Assessment: Scheduling a Walk-in Patient  
MOSS 22.20 Assessment: Rescheduling a Patient Appointment  
Skill - Apply HIPAA Rules in Regard to Patient Privacy and Release of Information When  
Scheduling a Patient Procedure Video  
Skill Reflection 1 - Apply HIPAA Rules in Regard to Patient Privacy and Release of  
Information When Scheduling a Patient Procedure  
Skill Reflection 2 - Apply HIPAA Rules in Regard to Patient Privacy and Release of  
Information When Scheduling a Patient Procedure  
Skill Reflection 3 - Apply HIPAA Rules in Regard to Patient Privacy and Release of  
Information When Scheduling a Patient Procedure  
Apply IHIPAA Rules in Regard to Patient Privacy and Release of Information When  
Scheduling a Patient Procedure Pass-off  
MOSS 22.21 Assessment: Canceling a Patient Appointment  
MOSS 22.22 Assessment: Checkin in a New Patient (Alvarez)  
MOSS 22.23 Assessment: Checking in a New Patient (Acuna)  
MOSS 22.24 Assessment: Checking in a New Patient (Bachmayer)

MOSS 22.25 Assessment: Checking in a New Patient (Johns.son)

MOSS 22.26 Assessment: Checking in a New Patient (Lindgren)

MOSS 22.27 Assessment: Checking in an Established Patient (Wolf)

MOSS 22.28 Assessment: Checking in an Established Patient (Patel)

MOSS 22.29 Assessment: Checking in an Established Patient (Costa)

MOSS 22.30 Assessment: Checking in an Established Patient (Blomquist)

MOSS 22.31 Assessment ADVANCED: Checking in a New Patient (Lorenzo)

Skill - Explain General Office Policies to the Patient

Skill Reflection 1 - Explain General Office Policies to the Patient

Skill Reflection 2 - Explain General Office Policies to the Patient

Skill Reflection 3 - Explain General Office Policies to the Patient

Explain General Office Policies to the Patient Pass-off

Skills List

Case Study: Maintaining the Schedule (Chapter 22 Scheduling Appointments and Receiving Patients)

Quiz: Chapter 22 Scheduling Appointments and Receiving Patients

Flashcards: Chapter 22 Scheduling Appointments and Receiving Patients

Scheduling Appointments and Receiving Patients Exam- Requires Respondus LockDown Browser

Check point meeting- Module 3

Read: Chapter 23 The Medical Record, Documentation, and Filing

PowerPoints: Chapter 23 The Medical Record, Documentation, and Filing

Medical Record, Documentation, and Filing Concept Check

Release of Patient Information Form

MOSS 23.1 Training: Using Meaningful Use Statistics

MOSS 23.2 Training: Gathering Documents and Results for a Patient Appointment (Acuna)

MOSS 23.3 Training: Gathering Documents and Results for a Patient Appointment (Bachmayer)

MOSS 23.4 Training: Gathering Documents and Results for a Patient Appointment (Lorenzo)

MOSS 23.5 Training: Documenting a Clinical Encounter (Weinert)

MOSS 23.6 Training: Documenting a Patient's Progress (Weinert)

MOSS 23.7 Training: Documenting a Patient's Progress (Wolf)

Check Your Understanding: Chapter 23 The Medical Record, Documentation, and Filing

MOSS 23.1 Assessment: Using Meaningful Use Statistics

MOSS 23.2 Assessment: Gathering Documents and Results for a Patient Appointment (Acuna)

MOSS 23.3 Assessment: Gathering Documents and Results for a Patient Appointment (Bachmayer)

MOSS 23.4 Assessment: Gathering Documents and Results for a Patient Appointment (Lorenzo)

MOSS 23.5 Assessment: Documenting a Clinical Encounter (Weinert)

MOSS 23.6 Assessment: Documenting a Patient's Progress (Weinert)

MOSS 23.7 Assessment: Documenting a Patient's Progress (Wolf)

Perform Compliance Reporting Based on Public Health Statutes

Create and Organize a Patient's Medical Record

Jane Doe

Janie Dally

Paul Doe

Numeric and Alphabetic Filing Systems

Competency Challenge: Medical Records (Chapter 23 The Medical Record, Documentation, and Filing)

Case Study: Correcting a Charting Error (Chapter 23 The Medical Record, Documentation, and Filing)

Quiz: Chapter 23 The Medical Record, Documentation, and Filing

Flashcards: Chapter 23 The Medical Record, Documentation, and Filing

The Medical Record, Documentation, and Filing Exam- Requires Respondus LockDown Browser

Check point meeting- Module 4

End of Course Survey

Imported on 08/ 22/ 2024

Medical Office I

Course Orientation

Chapter 1: The Medical Assistant, Health Care Team, and Medical Environment

Chapter 2: Professionalism

Chapter 3: Legal and Ethical Issues

Chapter 4: Applying Communication Skills

Chapter 5: Introduction to Medical Terminology

Chapter 6: Anatomic Descriptors and Fundamental Body Structure

Chapter 7: The Nervous System

Chapter 8: The Senses

Chapter 9: The Integumentary System

Chapter 10: The Skeletal System

Chapter 11: The Muscular System

Chapter 12: The Respiratory System

Chapter 13: The Circulatory System

Chapter 14 The Lymphatic/Immune System

Chapter 15: The Digestive System

Chapter 16: The Urinary System

Chapter 17: The Endocrine System  
Chapter 19: Telephone Communications  
Chapter 20: Written Communications  
Chapter 21: The Office Environment  
Chapter 22: Scheduling Appointments and Receiving Patients  
Chapter 23: The Medical Record, Documentation, and Filing  
Chapter 24: Health Insurance  
Chapter 25: Procedural and Diagnostic Coding  
Chapter 26: Patient Accounts  
Chapter 27: Preparing Insurance Claims and Posting Insurance Payments  
Chapter 28: Patient Billing, Posting Patient Payments, and Collecting Fees  
Chapter 29: Banking Procedures  
Chapter 30: Accounts Payable and Accounting Procedures  
Chapter 31: Infection Control and Medical Asepsis  
Chapter 32: The Medical History and Patient Screening  
Chapter 33: Body Measurements and Vital Signs  
Chapter 34: Preparing for Examinations  
Chapter 35: The Physical Exam  
Chapter 36: Specialty Examinations and Procedures  
Chapter 37: OB/GYN Examinations  
Chapter 38: Pediatric Examinations  
Chapter 39: Geriatrics  
Chapter 40: Mental Health  
Chapter 41: The Physician's Office Laboratory  
Chapter 42: Specimen Collection and Processing  
Chapter 43: Blood Specimen Collection  
Chapter 44: Diagnostic Testing  
Chapter 45: Cardiology Procedures  
Chapter 46: Radiology Procedures  
Chapter 47: Preparing for Surgery  
Chapter 48: Assisting with Minor Surgery  
Chapter 49: Pharmacology Fundamentals  
Chapter 50: Measurement Systems, Basic Mathematics, and Dosage Calculations  
Chapter 51: Administering Oral and Noninjectable Medications  
Chapter 52: Administering Injections and Immunizations  
Chapter 53: Emergencies in the Medical Office  
Chapter 54: First Aid for Accidents and Injuries  
Chapter 55: Rehabilitation  
Chapter 56: Nutrition, Exercise, and Healthy Living  
Chapter 57: Practicum and the Job Search  
Chapter 58: Managing the Office  
Additional Resources  
Cengage Technical Support  
Cengage Student Dashboard/ Instructor Center

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*Subject to change. Please consult your Canvas course for the most current instructions and updates.*

## Classroom Hours

Mo, Tu, W, Th, Fr  
8:00 AM - 11:00 AM  
12:00 PM - 3:00 PM

For a full list of course hours visit: [Course Schedule](#)

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## Instructor Contact Information

Dusty Hunter — [dhunter@stech.edu](mailto:dhunter@stech.edu)  
Candice Cox — [ccox@stech.edu](mailto:ccox@stech.edu)

Office Hours: By appointment

Email is the preferred method of communication; you will receive a response within 24 hours during regular business hours.

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## Canvas Information

Canvas is the where course content, grades, and communication will reside for this course.

- [stech.instructure.com](https://stech.instructure.com)
- For Canvas passwords or any other computer-related technical support contact Student Services.
- For regular Hours and Weekdays call (435) 586 - 2899.
- For after Hours & Weekends call (435) 865 - 3929 (Leave a message if no response).

Course Policies

Policies-Students must adhere to the Program Safety, Work Ethic, and Dress Code as outlined in the Medical Assistant Policies & Orientation. Attendance is important to your success in the Medical Assistant program. You are responsible for the schedule that you set at the beginning of your course and to sign in at the clock-in station at the beginning of your first hour and sign out after your last hour. You are allotted one 15-minute break during each 3-hour block of time, breaks should not be taken within the first or last 30 minutes of your schedule. Problems with signing in must be reported to an instructor as soon as possible. You must maintain 80% attendance in the program. Failure to meet the required attendance standard will result in academic corrective action being taken. If you are going to be absent, communication with the instructor is required to set up time to make up the time missed. This makeup time will be scheduled at the convenience of the instructors and the availability of the classroom and clinic. If you do not have a schedule for ten (10) consecutive days, you will be withdrawn from Southwest Tech. Students are expected to complete coursework according to the scheduled amount of hours designated for the course. All students in the program must stay on task and maintain a minimum 67% progress to retain financial aid eligibility. Failure to meet these requirements shall result in the student completing an Academic Intervention Plan with the Medical Assistant program leadership team and possibly academic warning, probation, and withdrawal from the program if not brought up by the end of each quarter. Cell phones should be on silent and are not allowed in the clinic area. Be courteous to your classmates and take phone calls out in the hall. Excessive cell phone use can hinder progress. Grading- Each assignment is awarded points according to how well the submission follows the assignment's requirements. Written submissions are graded according to the college writing guidelines. Students must have a minimum of 80% on each module to pass off the module and all modules must be passed off before students are allowed to sign up for the next class. Some assignments may be submitted more than once. If that is the case the assignment will clearly state this. At the end of each module, students are asked to submit a "Module Checkpoint Meeting" showing that they have completed all module requirements.

High School Power School Grades: Quarter student grades will be determined by student progress percentage. Faculty will use the higher percentage of either 1) quarter progress, or 2) cumulative progress for the current training plan year. The progress percentage will be used with the grading scale to determine the minimum grade. High School Grade Scale: The following grading scale will be used to determine a letter grade from the progress percentage:

- |                 |                 |                 |                 |
|-----------------|-----------------|-----------------|-----------------|
| • A : 94 - 100% | • B : 83 - 86%  | • C : 73 - 76%  | • D : 63 - 66%  |
| • A- : 90 - 93% | • B- : 80 - 82% | • C- : 70 - 72% | • D- : 60 - 62% |
| • B+ : 87 - 89% | • C+ : 77 - 79% | • D+ : 67 - 69% | • F : 0 - 59%   |

## Additional Information

InformaCast Statement: Southwest Tech uses InformaCast to ensure the safety and well-being of our students. In times of emergency, such as weather closures and delays, this app allows us to promptly deliver notifications directly to your mobile devices. To stay informed and receive real-time updates, we encourage all students to sign up for notifications. Your safety is our priority, and staying connected ensures a swift response to any unforeseen circumstances. More information and directions for signing up are available at: <https://stech.edu/emergency-notifications/>

Internet Acceptable Use Policy: The student is expected to review and follow the Southwest Technical College Internet Safety Policy at: <https://stech.edu/students/policies/>

Student Code of Conduct Policy: The student is expected to review and follow the Southwest Technical College Student Code of Conduct Policy at: <https://stech.edu/students/policies/>

Accommodations: Students with medical, psychological, learning, or other disabilities desiring accommodations or services under ADA, must contact the Student Services Office. Student Services determines eligibility for and authorizes the provision of these accommodations and services. Students must voluntarily disclose that they have a disability, request an accommodation, and provide documentation of their disability. Students with disabilities may apply for accommodations, based on an eligible disability, through the Student Services office located at 757 W. 800 S., Cedar City, UT 84720, and by phone at (435) 586-2899. No diagnostic services are currently available through Southwest Technical College.

Safety and Building Maintenance: The College has developed and follows a variety of plans to ensure the safe and effective operation of its facilities and programs. The following plans are available online:

1) Facilities Operations and Maintenance Plan; 2) Technical Infrastructure Plan; and 3) Health and Safety Plan.

Withdrawals and Refunds: Please refer to the Southwest Technical College Refund Policy at: <https://stech.edu/students/policies/>

Any high school or adult student, who declares a technical training objective is eligible for admission at Southwest Technical College (Southwest Tech). Program-specific admissions requirements may exist and will be listed on the Southwest Tech website. A high school diploma or equivalent is not required for admission but is mandatory for students seeking Title IV Federal Financial Aid.

Non-Discriminatory Policy: Southwest Technical College affirms its commitment to promote the goals of fairness and equity in all aspects of the educational enterprise, and bases its policies on the idea of global human dignity.

Southwest Tech is committed to a policy of nondiscrimination. No otherwise qualified person may be excluded from participation in or be subjected to discrimination in any course, program or activity because of race, age, color, religion, sex, pregnancy, national origin or disability. Southwest Technical College does not discriminate on the basis of sex in the education programs or activities that it operates, as required by Title IX and 34 CFR part 106. The requirement not to discriminate in education programs or activities extends to admission and employment. Inquiries about Title IX and its regulations to STECH may be referred to the Title IX Coordinator, to the Department of Education, and/or to the Office for Civil rights.

If you believe you have experienced discrimination or harassment on our campus, please contact the Title IX Coordinator, Cory Estes: [cestes@stech.edu](mailto:cestes@stech.edu), (435) 865-3938.

For special accommodations, please contact the ADA Coordinator, Cyndie Tracy: [ctracy@stech.edu](mailto:ctracy@stech.edu), (435) 865-3944.

Southwest Technical College

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