Experiential Learning Portfolio for 10160140 Medical Office Administration

Student Contact Information:

Name: _____ Student ID#: _____

Email: _____ Phone: _____

Before attempting to complete this portfolio, the following prerequisites and/or corequisites must be met:
PREREQUISITE: 10160143 Medical Office Procedures and Customer Service

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 8 of the 9 competencies.

10160140 Medical Office Administration, 3 Associate Degree Credits

Course Description: Simulates handling patients and employees, applying customer service skills, and the use of computers in a medical/clinical setting. Hands-on experience in scheduling appointments, work in electronic medical records, establishing a fee schedule, and practice management. Utilizes Microsoft Office software, electronic billing software, electronic medical record software, telephone systems, internet, fax and e-mail.

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

Competency 1: Develop professional behavior, attitudes, and practices
Criteria: Performance will be satisfactory when:
- response demonstrates ethical behavior and personal attributes needed to be successful in the medical office
- response demonstrates understanding of HIPAA compliance
- response demonstrates appropriate professionalism and customer service skills

Learning Objectives:
a. Exhibit ethical behavior in the medical office
b. Demonstrate personal attributes needed to be successful in a healthcare setting
c. Practice confidentiality including HIPAA compliance
d. Demonstrate professionalism
e. Apply customer service skills in the healthcare setting

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 2: Maintain patient health records

Criteria: Performance will be satisfactory when:

- learner identifies proper procedures for creating and maintaining patient charts including documentation (using electronic health record software)

Learning Objectives:

a. Review medical office filing systems
b. Create patient charts
c. Retrieve patient charts
d. Create documentation in the patient record
e. Use electronic health record (EHR) software
f. Scan/upload documents to the patient's electronic health record

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 3: Perform basic health insurance procedures
Criteria: Performance will be satisfactory when:
- learner identifies basic health insurance terms and coding basics
- learner demonstrates the process for verifying insurance eligibility and precertification, including documentation
- learner accurately enters assigned ICD-10 and CPT medical codes to management software

Learning Objectives:
a. Define health insurance terms including managed care
b. Verify insurance eligibility, including documentation
c. Obtain insurance precertification, including documentation
d. Discuss coding basics
e. Enter assigned ICD and CPT medical codes to patient management software

Required Artifacts: None
Suggested Artifacts: Coding certification and/or coding classes

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 4: Perform billing and collection procedures

Criteria: Performance will be satisfactory when:

- learner identifies the processing of basic billing and coding
- learner utilizes fee schedules
- learner posts, charges, payments and adjustments using practice management software
- learner calculates reimbursement, adjustment, deductible and copayment amounts
- learner creates insurance claim forms and patient statements using practice management software
- learner identifies collection techniques and demonstrates professionalism and sensitivity with handling accounts receivable

Learning Objectives:

a. Discuss the basic elements of billing and coding
b. Identify the different types of fee schedules
c. Describe how to assign charges and CPT codes per procedure
d. Calculate reimbursement, adjustment, deductible, and copayments amounts
e. Post charges, payments, and adjustments to a ledger
f. Create insurance claim forms using practice management software
g. Prepare patient statements
h. Discuss sensitivity and professionalism in handling accounts receivable activities with clients
i. Discuss collection techniques

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 5: Maintain records for accounting and banking purposes
Criteria: Performance will be satisfactory when:
- learner identifies importance of maintaining and identifying integrity of accurate accounts receivable and accounts payable
- learner prepares financial reports
- learner creates bank deposits and maintains petty cash

Learning Objectives:
a. Discuss the importance of demonstrating integrity when dealing with practice/patient finance
b. Discuss accounts receivable procedures
c. Discuss accounts payable procedures
d. Review financial reports
e. Review aged receivable reports
f. Maintain petty cash fund
g. Prepare bank deposit

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 6: Apply office management policies

Criteria: Performance will be satisfactory when:

- learner identifies the importance of maintaining office equipment and inventory
- learner completes and confirms travel arrangements and itinerary
- learner performs scheduling a meeting, including creation of meeting announcement and agenda
- learner identifies the process for taking meeting minutes

Learning Objectives:

a. Discuss the importance of routine maintenance of office equipment
b. Perform an office inventory
c. Make travel arrangements
d. Confirm travel arrangements
e. Prepare an itinerary for doctors' travel
f. Prepare a meeting announcement
g. Create a meeting agenda
h. Review process for taking meeting minutes

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 7: Explain the importance of management in the medical office
Criteria: Performance will be satisfactory when:
- learner identifies desirable qualities of a medical office manager, as well as the types of leaders
- learner addresses ways in which employees are motivated
- learner identifies methods to conduct employee performance reviews
- learner describes the process for screening employment applications and resumes
- learner analyzes the desirable qualities of a medical office manager, as well as the types of leaders
- learner explores ways in which employees are motivated
- learner explores methods to conduct employee performance reviews
- learner examines the process for screening employment applications and resumes

Learning Objectives:
a. Discuss the desirable qualities of a medical office manager
b. Discuss the three types of leaders
c. Identify several ways in which employees are motivated
d. Discuss what to look for when reviewing resumes and applications
e. Describe how to conduct a performance review for an employee

Required Artifacts: None
Suggested Artifacts: Supervision/leadership certification/training and/or classes

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 8: Generate documents for employment in the healthcare setting

Criteria: Performance will be satisfactory when:
- learner identifies the application process
- learner includes resume, cover, and thank you letters
- learner completes employment application form
- learner collects reference letter and artifacts for portfolio

Learning Objectives:
a. Discuss the application process
b. Prepare a resume
c. Write letters (cover letter and thank you letter)
d. Complete employment application form
e. Collect reference letter
f. Compile artifacts for portfolio

Required Artifacts: None
Suggested Artifacts: Resume, cover letter, thank you letter.

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 9: Prepare for employment in the healthcare setting
Criteria: Performance will be satisfactory when:
- learner identifies the application process
- learner includes resume, cover, and thank you letters
- learner completes employment application form
- learner collects reference letter and artifacts for portfolio
- learner completes job interview

Learning Objectives:
a. Discuss the application process
b. Prepare a resume
c. Write letters (cover letter and thank you letter)
d. Complete employment application form
e. Collect reference letter
f. Compile artifacts for portfolio
g. Discuss interviewing skills

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