Medical Assisting

Study Guide

Assessments:
8617 Clinical Medical Assistant
8624 Administrative Medical
         Assistant
8625 Phlebotomy Technician

Aligned with
The American
Medical Technologists
Registered
Medical Assistant

Overview

This study guide is designed to help students prepare for the following Medical Assisting assessments: Clinical Medical Assistant, Administrative Medical Assistant, and Phlebotomy Technician. It not only includes information about the assessments, but also the skills standards upon which the assessments are based and test taking strategies. The assessments measure a student's ability to apply knowledge of the skills necessary for success in the Medical Assisting field.

Each of the four sections in this guide provides useful information for students preparing the Medical Assisting assessments.

- CareerTech and Competency-Based Education: A Winning Combination
- Medical Assisting Assessments
  - ► Assessment Information
  - ► Standards and Test Content
  - ► Sample Questions
  - ► Abbreviations, Symbols, and Acronyms
- Strategies for Test Taking Success
- Notes

The Clinical Medical Assistant assessment is aligned with The American Medical Technologists Registered Medical Assistant and endorsed by INTEGRIS Physicians Services. The Administrative Medical Assistant assessment is aligned with the AMT Administrative Specialist and endorsed by the INTEGRIS Physicians Services. The Phlebotomy Technician assessment is aligned with AMT Registered Phlebotomy Technician and endorsed by INTEGRIS Physicians Services.

American Medical Technologists is a nationally and internationally recognized health certification agency. AMT certification examinations are developed, administered, and analyzed using industry standards and state-of-the-art methodologies. AMT is also one of the few health care certification organizations accredited by the National Commission for Certifying Agencies.
www.americanmedtech.org

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CareerTech and Competency-Based Education:
A Winning Combination

Competency-based education uses learning outcomes that emphasize both the application and creation of knowledge and the mastery of skills critical for success. In a competency-based education system, students advance upon mastery of competencies, which are measurable, transferable outcomes that empower students.

Career and technology education uses industry professionals and certification standards to identify the knowledge and skills needed to master an occupation. This input provides the foundation for development of curriculum, assessments and other instructional materials needed to prepare students for wealth-generating occupations and produce comprehensively trained, highly skilled employees demanded by the work force.

Tools for Success

CareerTech education relies on three basic instructional components to deliver competency-based instruction: skills standards, curriculum materials, and competency assessments.

Skills standards provide the foundation for competency-based instruction and outline the knowledge and skills that must be mastered in order to perform related jobs within an industry. Skills standards are aligned with national skills standards and/or industry certification requirements; therefore, a student trained to the skills standards is equally employable in local, state and national job markets.

Curriculum materials and textbooks contain information and activities that teach students the knowledge and skills outlined in the skills standards. In addition to complementing classroom instruction, curriculum resources include supplemental activities that enhance learning by providing opportunities to apply knowledge and demonstrate skills.

Certification Assessments test the student over material outlined in the skills standards and taught using the curriculum materials and textbooks. When used with classroom performance evaluations, certification assessments provide a means of measuring occupational readiness.

Each of these components satisfies a unique purpose in competency-based education and reinforces the knowledge and skills students need to gain employment and succeed on the job.

Measuring Success

Evaluation is an important component of competency-based education. Pre-training assessments measure the student's existing knowledge prior to receiving instruction and ensure the student's training builds upon this knowledge base. Formative assessments administered throughout the training process provide a means of continuously monitoring the student's progress towards mastery.

Certification assessments provide a means of evaluating the student's mastery of knowledge and skills. Coaching reports communicate assessment scores to students and provide a breakdown of assessment results by standard area. The coaching report also shows how well the student has mastered skills needed to perform major job functions and identifies areas of job responsibility that may require additional instruction and/or training.

Medical Assisting
Assessment Information

What are the Medical Assisting assessments?

The Clinical Medical Assistant assessment, Administrative Medical Assistant assessment, and Phlebotomy Technician assessment are end-of-program assessments for students in Medical Assisting programs. The assessments provide an indication of student mastery of knowledge and concepts necessary for success in careers in this area.

How were the assessments developed?

The assessments were developed by the CareerTech Testing Center. The Clinical Medical Assistant assessment is aligned with AMT Registered Medical Assistant and endorsed by INTEGRIS Physicians Services. The Administrative Medical Assistant assessment is aligned with the AMT Administrative Specialist and endorsed by the INTEGRIS Physicians Services. The Phlebotomy Technician assessment is aligned with AMT Registered Phlebotomy Technician and endorsed by INTEGRIS Physicians Services. Items were developed and reviewed by a committee of subject matter experts.

What do the assessments cover?

Specifically, the test includes multiple-choice test items over the following areas:

Clinical Medical Assistant (100 questions)

Display Professionalism	16%
Apply Communication Skills	18%
Perform Clinical Duties	46%
Apply Legal, Ethical, and Confidentiality Concepts	12%
Provide Patient Instruction	8%

Administrative Medical Assistant (85 questions)

Medical Assisting Foundations	15%
Basic Clinical Medical Office Assisting	15%
Medical Office Clerical Assisting	15%
Medical Records Management	9%
Health Care Insurance Processing, Coding, and Billing	16%
Medical Office Financial Management	11%
Medical Office Information Processing	6%
Medical Office Management	13%

Phlebotomy Technician (75 questions)

Obtaining Blood Samples	41%
Specimen Collection and Processing	7%
Time Management and Assignment Organization	9%
Professional Communications	3%
Clerical Skills and Duties	5%
Safety Standards and Procedures	15%
Legal, Ethical, and Professional Considerations	9%
Terminology, Anatomy, and Physiology	11%

What are the benefits of using these assessments?

Students receive a certificate for each assessment that he/she passes. This certificate may be included in his/her portfolio and used to communicate the student's mastery of the subject matter to potential employers.

When should the assessment be taken?

The CareerTech Testing Center recommends that students take the assessments as soon as possible after receiving all standards-related instruction, rather than waiting until the end of the school year.

Are the assessments timed?

No. However, most students finish the assessment within one hour.

What resources can students use on these assessments?

Students are allowed to use calculators and scratch paper on CTTC assessments; however, these items must be provided by the testing proctor and returned to the proctor before the student's exam is submitted for scoring. Calculator apps on cell phones and other devices may not be used on these assessments.

What accommodations can be made for students with Individualized Education Plans?

Accommodations are allowed for students with an Individualized Education Plan. Examples of allowable accommodations include:

- Extended time — This assessment is not timed; therefore, students may take as much time as needed to finish. The assessment must be completed in one testing session.

- Readers — A reader may be used to read the assessment to a student who has been identified as needing this accommodation.

- Enlarged text — Students needing this accommodation can activate this feature by clicking the AA icon in the upper right corner of the screen.

What can students expect on test day?

All CTTC assessments are web-based and delivered exclusively by a proctor in the school's assessment center. The proctor **cannot** be an instructor or anyone who was involved with the student during instruction.

Assessments are delivered in a question-by-question format. When a question is presented, the student can select a response or leave the question unanswered and advance to the next question. Students may also flag questions to revisit before the test is scored. All questions must be answered before the test can be submitted for scoring.

After the assessment is scored, the student will receive a score report that not only shows the student's score on the assessment, but also how the student performed in each standard area.

Can students retake the test?

Students may retake the test unless their school or state testing policies prohibit retesting. Students who can retest must wait at least three days between test attempts.

8617 Clinical Medical Assistant

Frequency (F): represents how often the task is performed on the job. Frequency rating scales vary for different occupations. The rating scale used in this publication is presented below:

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        2 = at least once a week
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Criticality (C): denotes the level of consequences associated with performing a task incorrectly. The rating scale used in this publication is presented below:

        1 = slight
        2 = moderate
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DUTY A: Display Professionalism (16 questions)

CODE	TASK	F	C

A.01	Project a positive attitude
	• Anticipate and respond to the needs of others
	• Display a sincere interest in providing appropriate information
	• Enforce positive perceptions and overcome negative perceptions
	• Act as a role model for holistic health
	• Display a professional image and dress
	  ‣ Business dress, posture, personal habits, gestures
	  ‣ Hygiene (hair, cleanliness, make-up)
	  ‣ Etiquette (table manners, gum, handshakes, introductions, etc.)
		3	2

A.02	Demonstrate ethical behavior	3	3
A.03	Practice within the scope of education, training and personal capabilities • Determine personal capabilities and performance limitations • Recognize and function within personal limitations	3	3
A.04	Maintain confidentiality • Maintain confidentiality of verbal, written, and computer information	3	3
A.05	Work as a team member • Display awareness of own and other team members' responsibilities (physicians, other office staff) • Interact with others in a supportive manner • Practice the techniques of successful group dynamics and team building • Knowledge of work processes (how to recognize what and why other staff need information)	3	2
A.06	Conduct oneself in a courteous and diplomatic manner • Interact with others in a polite, cordial manner • Abide by geographic and cultural customs of courtesy • Use communication techniques such as non-aggressive language and active listening	3	2

CODE	TASK	F	C
A.07	Adapt to change • Assess the type of conflict that is occurring • Confront the issues and people involved to resolve the conflict • Apply problem solving skills to: ▸ Prioritize needs ▸ Modify activities ▸ Adapt schedules ▸ Revise procedures ▸ Reassign duties	3	3
A.08	Show initiative and responsibility • Attend work regularly and arrive on time • Perform tasks properly, completely, and accurately • Accept responsibility for own actions; admit errors and assist in corrections • Recognize the work to be done and offer assistance • Volunteer for additional duties as time allows • Set and achieve self-development goals ▸ Educational needs ▸ Professional goals ▸ Personal goals • Recognize community organizations	3	3
A.09	Promote the profession • Maintain and encourage professional membership at the local, state, and national level (American Association of Medical Assistants, Professional Secretaries International, Vocational Student Organizations) • Participate in professional meetings, seminars, workshops, and community events ▸ Attendance ▸ Sponsorship ▸ Presentations • Project the concept of the professional medical assistant	2	2
A.10	Apply critical thinking skills to workplace situations • Utilize quality performance processes • Utilize tools to analyze information ▸ Basic statistical concepts and analysis, create charts, histograms, flow charts, quality tools	3	3
A.11	Manage stress • Identify factors that cause stress • Basic ways to reduce stress (diet, exercise) • In-house and outside resources • Separating home and work stress	2	2

DUTY B: Apply Communication Skills (18 questions)

CODE	TASK	F	C
B.01	Listen and observe • Use listening and understanding techniques to determine key ideas for each of the following ▸ Patients ▸ Business Contacts ▸ Family members ▸ Observe to identify needs of others ▸ Team members	3	3

CODE	TASK	F	C

B.02	Treat all patients with empathy and impartiality
	• Display empathic behavior in patient relationships
	  ‣ Identify verbal and nonverbal cues that express feelings, emotions, and needs
	  ‣ Interact with patients in such a manner as to encourage them to express feelings, emotions, and needs
	• Display impartial behavior
	  ‣ Identify personal bias and prejudice
	  ‣ Recognize and respond appropriately to cultural differences
		3	3

B.03	Adapt communication to individual's abilities to understand • Identify patients with special needs • Use appropriate responses to communicate with patients with special needs	3	3

B.04	Recognize and respond to verbal and nonverbal communication
	• Select appropriate response to verbal messages
	• Select appropriate response to nonverbal messages by
	  ‣ Giving support through positive body language
	  ‣ Exhibiting active listening skills
	  ‣ Overcoming obstacles to nonverbal communication
		3	3

B.05	Serve as liaison between physician and others • Identify the professional roles of allied health care providers • Recognize professional licensure/certification credentials • Respond in professional situations in a manner that enhances the stature of the physician/employer	3	3

B.06	Evaluate understanding of communication
	• Determine if the receiver understood intent and content of the communications by:
	  ‣ Practicing active listening ‣ Questioning for clear interpretation
	  ‣ Paraphrasing statements ‣ Observing responses
		3	3

B.07	Receive, organize, prioritize and transmit information • In person • By telephone • By mail • By memo • By Fax • By computer (i.e., electronic mail, Internet) • Utilize appropriate confidentiality release and transmittal procedures (including HIPAA Privacy Rule) • Organize and prioritize incoming information	3	3

CODE	TASK	F	C

B.08	Use proper telephone technique
	• Project positive telephone image
	• Handle incoming telephone calls as follows:
	  ▸ Receive incoming calls ▸ Manage multiple incoming calls
	  ▸ Screen incoming calls ▸ Utilize telephone log or computerized system
	  ▸ Transfer incoming calls when indicated
	• Handle the following telephone calls:
	  ▸ Appointments for patients ▸ Requests for referrals
	  ▸ Inquiries about bills ▸ Receiving X-ray or lab reports
	  ▸ Requests about fees ▸ Requests for insurance assistance
	  ▸ Satisfactory progress reports from patients or family members
	  ▸ Routine reports from hospitals and other sources
	  ▸ Office administration matters
	• Handle telephone calls involving special problems
	  ▸ Unidentified callers ▸ Calls from family and friends
	  ▸ Angry callers ▸ Callers who will not end the call
	• Handle telephone calls involving medical emergencies
	• Record and deliver accurate telephone message
	• Organize and place outgoing telephone calls
	  ▸ Local
	  ▸ Conference
	  ▸ Long distance
	• Utilize special features, if available
	• Identify factors that relate to a global business environment
	  ▸ Time zones
	  ▸ International dialing codes
	  ▸ Mailing
	• Use telephone directories
	  ▸ Directory — types and organization
	  ▸ Company directory maintenance
	  ▸ Telephone assistance and information
		3	2

B.09	Interview effectively • Patient by telephone • Family member in office • Patient in office • Supplier/pharmaceutical representative • Family member by telephone	3	2

B.10	Use medical terminology appropriately
	• Build and define medical terms
	• Select and use appropriate terminology in the following:
	  ▸ Transcription
	  ▸ Patient education
	  ▸ Reports
	  ▸ Correspondence
	  ▸ Records and documents
	• Utilize technical references to verify accuracy
	  ▸ Spelling
		3	3

CODE	TASK	F	C

B.11	**Compose written communication using correct grammar, spelling and format**
	• Select and use appropriate format for written communication
	• Use reference materials
	  ▸ Dictionary ▸ Gregg's Reference Manual
	  ▸ Thesaurus ▸ Software/hardware documentation
	  ▸ Secretarial reference manuals ▸ Microsoft Office Spell Check
		2	2

DUTY C: Perform Clinical Duties (46 questions)

CODE	TASK	F	C

C.01	**Apply principles of aseptic technique**
	• Perform medical aseptic procedures
	  ▸ Handwashing ▸ Chemical disinfection of articles
	  ▸ Sanitize instruments ▸ Work environment
	• Perform surgical aseptic procedures
	  ▸ Wrap and autoclave an article ▸ Apply and remove sterile gloves
	  ▸ Perform a surgical scrub ▸ Perform a sterile dressing change
	  ▸ Utilize transfer forceps ▸ Assist with minor office surgery
	  ▸ Open a sterile pack ▸ Remove sutures
	  ▸ Set up a sterile tray
		3	3

C.02	**Apply principles of infection control** • Orientation and documentation of bloodborne pathogens • Process all specimens in a manner that eliminates or reduces the transmission of disease • Maintain an environment that eliminates or reduces transmission of disease • Dispose of specimens and equipment in accordance with federal, state, and local guidelines (CDC, OSHA)	3	3

C.03	**Take vital signs**
	• Body temperature
	  ▸ Take and record oral temperature
	  ▸ Take and record rectal temperature
	  ▸ Take and record axillary temperature
	• Pulse
	  ▸ Take and record radial pulse
	  ▸ Take and record apical pulse
	• Respiration
	  ▸ Take and record respiration
	• Blood pressure
	  ▸ Take and record blood pressure
		3	3

C.04	**Recognize emergencies**
	• Distinguish between emergency and non-emergency situations
	• Apply assessment techniques to:
	  ▸ Perform telephone assessment
	  ▸ Prepare for an emergency
	  ▸ Perform visual assessment
		3	3

CODE	TASK	F	C

C.05	Perform first aid and CPR
	• Administer first aid
	  ▸ Control bleeding ▸ Treat seizures
	  ▸ Apply bandages ▸ Treat for poisoning
	  ▸ Treat for shock ▸ Treat for burns
	  ▸ Immobilize fractures ▸ Treat diabetic emergencies
	  ▸ Treat syncope ▸ Treat central nervous system injuries and disorders
	• Administer CPR
	  ▸ Remove airway obstructions
	  ▸ Administer artificial ventilation
	  ▸ Administer chest compressions
	  ▸ Perform abdominal thrust on a conscious adult, child, or infant when choking
		2	3

C.06	Prepare and maintain examination and treatment area • Ensure cleanliness • Check equipment for proper working order and safety • Assemble equipment for examination/treatment • Remove used items from examination/treatment room • Restock supplies in examination/treatment area • Observe safety precautions	3	3
C.07	Interview and take patient history • Complete a patient history • Interview the patient to obtain patient history data • Record patient history	3	3

CODE	TASK	F	C

C.08	Prepare patients for procedures
	• Instruct patients in preparation for examinations and procedures
	  ▸ Routine physical exams
	  ▸ Specialty exams
	• Position and drape patient in the following positions:
	  ▸ Horizontal recumbent ▸ Knee-chest
	  ▸ Dorsal recumbent ▸ Dorsal lithotomy
	  ▸ Sim's
	• Prepare and/or secure patient's written consent as required
	• Instruct and inform patients in preparation for procedures and examinations
	• Apply principles of radiation safety if assisting with radiographic procedures
	  ▸ Wear dosimetry badge
	  ▸ Protect patient from undue exposure
	• Provide post-procedure instructions
	  ▸ Screen incoming calls
	  ▸ Utilize telephone log or computerized system
	  ▸ Transfer incoming calls when indicated
	• Handle the following telephone calls:
	  ▸ Appointments for patients ▸ Requests for referrals
	  ▸ Inquiries about bills ▸ Receiving X-ray or lab reports
	  ▸ Requests about fees ▸ Requests for insurance assistance
	  ▸ Satisfactory progress reports from patients or family members
	  ▸ Routine reports from hospitals and other sources
	  ▸ Office administration matters
	• Handle telephone calls involving special problems
	  ▸ Unidentified callers ▸ Calls from family and friends
	  ▸ Angry callers ▸ Callers who will not end the call
	• Handle telephone calls involving medical emergencies
	• Record and deliver accurate telephone message
	• Organize and place outgoing telephone calls
	  ▸ Local
	  ▸ Conference
	  ▸ Long distance
	• Utilize special features, if available
	• Identify factors that relate to a global business environment
	  ▸ Time zones
	  ▸ International dialing codes
	  ▸ Mailing
	• Use telephone directories
	  ▸ Directory — types and organization
	  ▸ Company directory maintenance
	  ▸ Telephone assistance and information
		3	3

C.09	Assist physician with examinations and treatments
	• Explain procedures to patient
	• Prepare supplies for procedures and treatments
	• Assist physician with examinations and treatments
	  ▸ Anticipate needs of physician
	  ▸ Provide patient with instructions
	  ▸ Chart procedures
	  ▸ Clean examination/treatment room
		3	3

CODE	TASK	F	C

C.10	Use quality control
	• Use quality control principles during:
	  ‣ Patient preparation ‣ Instrument calibration
	  ‣ Specimen collection and handling ‣ Laboratory testing
	  ‣ Reagent management ‣ Diagnostic testing
	• Prepare/maintain quality control log book
	  ‣ Record quality control data
	  ‣ Maintain records of quality control data
		3	3

C.11	Collect and process specimens
	• Complete a laboratory request form
	• Instruct patient in specimen collection
	• Prepare equipment/supplies for collection
	• Collect and label biological specimen
	  ‣ Blood
	• Venipuncture
	• Capillary puncture
	  ‣ Urine
	• Clean catch
	• Timed
	• Random
	• Midstream
	  ‣ Stool ‣ Throat culture
	  ‣ Sputum ‣ Vaginal
	• Process specimens after collection
	• Deliver specimens for laboratory testing
	• Prepare/fix specimen for examination
	• Dispose of specimens and collection equipment
		3	3

C.12	Perform selected tests that assist with diagnosis and treatment
	• Perform a routine urinalysis and record results
	  ‣ Physical
	  ‣ Microscopic
	  ‣ Chemical
	• Perform hematologic tests and record results
	  ‣ Hematocrit ‣ Erythrocyte sedimentation rate
	  ‣ Hemoglobin ‣ Blood cell counts
	• RBC
	• WBC
	• Platelet count
	  ‣ Differential white blood cell count
	• Perform blood chemistry testing and record results
	  ‣ Glucose (FBS, GTT) ‣ Cholesterol
	  ‣ BUN ‣ Triglycerides
		3	3

C.13	Perform immunological tests and record results • Mono tests • Pregnancy tests • Strep screen • Allergy scratch tests • Rh factor	3	3

CODE	TASK	F	C
C.14	Perform microbiological tests and record results • Streptococcal testing • Gram staining • Urine culture • Sensitivity testing • Wound culture • Sensitivity testing • Vaginal cultures	3	3
C.15	Perform tuberculosis screen and record results • Tine • Mantoux	2	3
C.16	Run an electrocardiogram and record results • 12-lead • Rhythm strip	2	3
C.17	Perform vision testing and record results • Distance visual acuity • Color blindness • Near visual acuity	2	2
C.18	Screen and follow up patient test results • Alert physician/supervisor of abnormal test results • Upon physician's orders: ▸ Discuss test results with patient ▸ Instruct patient on diet modification ▸ Instruct patient on drug dosage modification ▸ Schedule patient for: — Hospitalization — Other physicians — Surgery — Physical therapy — Return office visit — Other treatments	3	3
C.19	Prepare and administer medications as directed by physician • Select the proper medication to administer • Calculate a drug dosage • Prepare the medication ▸ Transfer oral medication to medicine cup ▸ Reconstitute a powdered drug ▸ Withdraw parenteral medication for an ampule ▸ Withdraw parenteral medication from a vial ▸ Prepare a unit-dose cartridge syringe • Administer medication and record the procedure ▸ Oral solid medication ▸ Intramuscular injection ▸ Oral liquid medication ▸ Topical medication ▸ Intradermal injection ▸ Eye drops ▸ Subcutaneous injection ▸ Ear drops	3	3
C.20	Maintain medication records • Record medication given • Maintain a controlled substance log book • Write a prescription for physician signature	3	3
C.21	Utilize proper body mechanics	3	2

CODE	TASK	F	C
C.22	Apply basic math to medically related problems • Patient weight • Add, subtract, multiply, and divide • Compute cost of supplies used (student used 4 Foley catheters and they cost X each – compute patient charges) • Inventory/supply problem (Suzanne knows of problem-in Keir Med Asst test) • Compute cost of day in a health care facility	3	3
C.23	Interpret diagrams, charts, graphs and tables • Table of conversions • Temperature or weight graphs • X/y growth charts • Rule of nines • Household-metric-apothecary equivalents (table)	2	3
C.24	Convert household, apothecary and metric measures	2	3
C.25	Use formulas and equations to solve health-related math problems • Metric to U.S. and U.S. to metric; ratio and proportions • Solving for X (prep for dosage calculations)	2	3
C.26	Transfer and transport patients with our without assistive devices using proper body mechanics • Operate wheelchair • Assist clients/patients with ambulation (crutches, canes, walkers, and gait belts) • Provide transfer assistance to patients/clients • Wheelchair, chair, bedside commode, stretcher, and bed	2	3

DUTY D: Apply Legal, Ethical and Confidentiality Concepts (12 questions)

CODE	TASK	F	C
D.01	Document accurately • Accurately document medical information • Appropriately correct medical information entries	3	3
D.02	Determine needs for documentation and reporting • Identify sources of information for medicolegal documentation requirements in given locality • Observe local, state, and federal guidelines for statutory reports • Abide by reporting/documentation procedures for DEA • Fulfill IRS guidelines for reports and documentation • Obtain employment guidelines from appropriate agency and comply • Document medical records and complete incident report promptly for all personal injury occurrences • Comply with workers' compensation reporting requirements • Document all activity related to patient care in the medical record	3	3

CODE	TASK	F	C
D.03	Use appropriate guidelines when releasing records or information • Protect privacy and confidentiality of patient health information • Release information in accordance with federal and state regulations ▸ Basic right to privacy ▸ Drug and alcohol rehabilitation records ▸ Public health and welfare disclosures ▸ Rights of minors ▸ HIV-related issues ▸ Subpoena duces tecum/depositions/court orders • Release information in response to written patient authorization • Honor a patient request to rescind an authorization to release information	3	3
D.04	Follow established policy in initiating, withdrawing, withholding or terminating medical treatment • Health care provider/physician/patient contract (offer, acceptance, consideration) • Knowledge of the elements to be included in a letter of withdrawal • Certified mail and return receipt • Advance directives/Do Not Resuscitate • Organ donations	2	3
D.05	Dispose of controlled substances in compliance with government regulations • Identify controlled substances and their schedules • Comply with DEA regulations	3	3
D.06	Maintain licenses and accreditation	2	3
D.07	Monitor legislation related to current health care and practice	2	3
D.08	Perform within ethical boundaries • Apply ethical standards in the workplace • Respect patient rights • Recognize practices which involve bioethical issues	3	3

DUTY E: Provide Patient Instruction (8 questions)

CODE	TASK	F	C
E.01	Orient patients of office policies and procedures • Provide maps or verbal instructions on location • Introduce office personnel • Provide written and verbal information on office policies • Answer questions within scope of training and education • Use patient education systems and literature	2	3

CODE	TASK	F	C

E.02	Instruct patients with special needs
	• Instruct and demonstrate routine procedures for monitoring body functions
	• Instruct and demonstrate safety procedures for home medical equipment
	• Demonstrate care, use, and special equipment to patient
	  ▸ Basic right to privacy ▸ Crutches
	  ▸ Walkers ▸ Wheelchairs
	  ▸ Hearing aids ▸ Braces
	  ▸ Splints ▸ Casts
	  ▸ Slings ▸ Prosthetic appliances
	• Provide written and verbal instructions on chronic disease conditions, as instructed by the physician
		2	3

E.03	Teach patients methods of health promotion and disease prevention • Provide verbal and written information about routine physical examinations and laboratory testing	3	3
E.04	Provide verbal and written information • Nutrition and diet therapy • Exercise and weight control • Hygiene • Sexually transmitted/communicable diseases and preventive measures • Family planning • Smoking cessation • Alcohol/drug prevention and treatment • Instruct and assist patients with performance of self-breast examinations • Refer patients to outside resources as instructed by the physician	2	3
E.05	Orient and train personnel • Introduce office staff • Orientation to facility • Assisting in the completion of personnel documents • Distribute job descriptions • Assign work schedule • Make daily work assignments • Demonstrate use of procedure manuals for the office • Demonstrate use of policy manuals for the office • Demonstrate use of office equipment • Provide information on CDC Universal precautions, OSHA and CLIA, HIPAA, and Americans with Disabilities Act regulation • Emergency preparedness plan	2	2

8624 Administrative Medical Assistant

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DUTY A: Medical Assisting Foundations (11 questions)

CODE	TASK	F	C
A.01	Medical terminology • Use and spell basic medical terms appropriately • Identify root words, prefixes and suffixes • Define basic medical terms	3	2
A.02	Anatomy and physiology • Know basic structures and functions of body systems • Know various disorders of the body (diseases, conditions, syndromes)	3	2
A.03	Legal and ethical considerations • Apply principles of medical law and ethics to the health care setting • Recognize legal responsibilities of, and know scope of practice for the medical administrative specialist • Know basic laws pertaining to medical practice • Know and observe disclosure laws (patient privacy, minors, confidentiality, and HIPAA) • Know the principles of medical ethics established by the AMA • Recognize unethical practices and identify ethical responses for situations in the medical office	3	3
A.04	Professionalism • Employ human relations skills appropriate to the health care setting • Display behaviors of a professional medical administrative specialist • Participate in appropriate continuing education	3	3

DUTY B: Basic Clinical Medical Office Assisting (11 questions)

CODE	TASK	F	C
B.01	Basic health history interview • Obtain preliminary health histories from patients	2	3
B.02	Basic charting • Chart patient information	3	3

CODE	TASK	F	C
B.03	Vital signs and measurements • Measure vital signs (temperature, pulse, respiration and blood pressure) • Obtain other vital measurements (weight, height)	2	3
B.04	Asepsis in the medical office • Understand concepts of asepsis, sanitization, disinfection, and sterilization • Understand prevention of disease transmission • Observe standard precautions	3	3
B.05	Examination preparation • Prepare patients for clinical examinations	2	3
B.06	Medical office emergencies • Recognize and respond to medical emergencies • Employ first aid and CPR appropriately • Report emergencies as required by law	2	3
B.07	Pharmacology • Understand basic pharmacological concepts and terminology	2	3

DUTY C: Medical Office Clerical Assisting (11 questions)

CODE	TASK	F	C
C.01	Appointment management and scheduling • Schedule and monitor patient and visitor appointments • Address cancellations and missed appointments • Prepare information for referrals and preauthorization • Arrange hospital admissions and surgery, and schedule patients for outpatient diagnostic tests • Manage recall system and file	3	3
C.02	Reception • Receive and process patients and visitors • Screen visitors and vendors requesting to see physician • Coordinate patient flow into examining rooms	3	3
C.03	Communication • Employ effective written and oral communication • Address and process incoming telephone calls from outside providers, pharmacies, and vendors • Employ appropriate telephone etiquette when screening patient calls and addressing office business • Recognize and employ proper protocols for telephone emergencies	3	3
C.04	Patient information and community resources • Order and organize patient informational materials • Maintain list of community referral resources	2	2

DUTY D: Medical Records Management (7 questions)

CODE	TASK	F	C
D.01	Systems • Manage and demonstrate knowledge of patient medical records systems • Manage documents and patient charts using paper methods • Manage documents and patient charts using computerized methods	3	3
D.02	Procedures • File records alphabetically, numerically, by subject, and by color • Employ rules of indexing • Arrange contents of patient charts in appropriate order • Document and file laboratory results and patient communication in charts • Perform corrections and additions to records • Store, protect, retain, and destroy records appropriately • Transfer files • Perform daily chart management • Prepare charts for external review and audits	3	3
D.03	Confidentiality • Observe and maintain confidentiality of records, charts, and test results • Observe special regulations regarding the confidentiality of protected information	3	3

DUTY E: Health Care Insurance Processing, Coding and Billing (12 questions)

CODE	TASK	F	C
E.01	Insurance processing • Understand private/commercial health care insurance plans (PPO, HMO, traditional indemnity) • Understand government health care insurance plans (Medicare, Medicaid, Veteran's Administration, CHAMPUS, Tricare, use of Advance Beneficiary Notices) • Process patient claims using appropriate forms (including superbills) and time frames • Process Workers' Compensation/disability reports and forms • Submit claims for third-party reimbursements, including the use of electronic transmission methods	3	3
E.02	Coding • Understand procedure and diagnosis coding • Employ Current Procedural Terminology (CPT) and Evaluation and Management codes appropriately • Employ International Classification of Diseases 10 (ICD-10) codes appropriately • Employ Health Care Financing Administration Common Procedure Coding System (HCPCS) codes appropriately	3	3
E.03	Insurance billing and finances • Understand health care insurance terminology (deductible, copayment, preauthorization, capitation, and coinsurance) • Understand billing requirements for health care insurance plans • Process insurance payments • Track unpaid claims, and file and track appeals • Understand fraud and abuse regulations	3	3

DUTY F: Medical Office Financial Management (8 questions)

CODE	TASK	F	C
F.01	Fundamental financial management • Understand basic principles of accounting • Perform bookkeeping procedures including balancing accounts • Perform financial computations • Manage accounts payable • Manage accounts receivable • Prepare monthly trial balance (reports) • Understand basic audit controls • Understand professional fee structures • Understand physician/practice owner compensation provisions • Understand credit arrangements • Manage other financial aspects of office management	3	3
F.02	Patient accounts • Manage patient accounts/ledgers • Manage patient billing (methods, cycle billing procedures) • Manage collections in compliance with state and federal regulations	3	3
F.03	Banking • Understand banking services and procedures (accounts, lines of credit, checking endorsements, deposits, reconciliation, and statements • Manage petty cash	2	3
F.04	Payroll • Prepare employee payroll and reports • Maintain payroll tax deduction procedures and records	2	2

DUTY G: Medical Office Information Processing (5 questions)

CODE	TASK	F	C
G.01	Fundamentals of computing • Possess fundamental knowledge of computing in the medical office including keyboarding, data entry, and retrieval • Possess fundamental knowledge of PC-based environment • Possess fundamental knowledge of word processing, spreadsheet, database, and presentation graphics applications • Employ procedures for ensuring the integrity and confidentiality of computer-stored information	3	3
G.02	Medical office computer applications • Employ medical office software applications • Use computer for billing and financial transactions • Employ e-mail applications	3	3

DUTY H: Medical Office Management (10 questions)

CODE	TASK	F	C
H.01	Office communications • Facilitate staff meetings and in-service, and ensure communication of essential information to staff	2	2
H.02	Business organization management • Manage medical office business functions • Manage office mailing and shipping services • Manage outside vendors and supplies • Manage contracts and relationships with associated health care providers • Comply with licensure and accreditation requirements	2	2
H.03	Human resources • Manage/supervise medical office staff • Conduct performance reviews and disciplinary action • Maintain office policy manual • Manage staff payroll and scheduling • Manage staff recruiting in compliance with state and federal laws • Orient and train new staff • Manage employee benefits	2	2
H.04	Safety • Maintain office safety, maintain office safety manual and post emergency instructions • Observe emergency safety requirements • Maintain records of biohazardous waste, hazardous chemicals (material safety data sheets) and safety conditions • Comply with Occupational Safety and Health Act (OSHA) guidelines and regulations	3	3
H.05	Supplies and Equipment • Manage medical and office supply inventories and order supplies • Maintain office equipment and arrange for (and maintain records of) equipment maintenance and repair	2	2
H.06	Physical Office Plant • Maintain office facilities and environment	2	2
H.07	Risk Management and Quality Assurance • Understand and employ risk management and quality assurance concepts	2	2

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Frequency (F): represents how often the task is performed on the job. Frequency rating scales vary for different occupations. The rating scale used in this publication is presented below:

        1 = less than once a week
        2 = at least once a week
        3 = once or more a day

Criticality (C): denotes the level of consequences associated with performing a task incorrectly. The rating scale used in this publication is presented below:

        1 = slight
        2 = moderate
        3 = extreme

DUTY A: Obtaining Blood Samples (31 questions)

CODE	TASK	F	C
A.01	Identify correct patient properly	3	3
A.02	Select appropriate containers for specimens and know requirements for container identification	3	3
A.03	Know physiological aspects of blood collection	3	3
A.04	Prepare patient for various tests	3	3
A.05	Select proper venipuncture site	3	3
A.06	Perform venipunctures	3	3
A.07	Collect specimen in proper tube-draw sequence	3	3
A.08	Perform skin punctures	3	3
A.09	Perform heel punctures on infants	2	3
A.10	Provide proper post care of venous, arterial, and skin puncture sites	3	3
A.11	Handle blood samples to maintain specimen integrity	3	3
A.12	Label transfusion services (blood bank) specimens according to proper protocol	2	3

DUTY B: Specimen Collection and Processing (5 questions)

CODE	TASK	F	C
B.01	Properly handle non-blood specimens to maintain their integrity	3	3
B.02	Properly collect and handle specimens with time/temperature requirements	3	3
B.03	Properly collect and handle specimens for blood cultures	3	3
B.04	Select proper station for specimen delivery	3	3
B.05	Process specimens for shipping	3	3
B.06	Instruct patient in the collection of urine specimens	3	3
B.07	Instruct patient in the collection of other specimens	3	3
B.08	Collect and process point-of-care testing (POCT) specimens	3	3

DUTY C: Time Management and Assignment Organization (7 questions)

CODE	TASK	F	C
C.01	Read physician orders and requisitions	3	3
C.02	Set priorities for specimen collection	3	3
C.03	Schedule time intervals for tolerance tests	2	3
C.04	Schedule time intervals for drug-related dependent tests	2	3
C.05	Refer problems to supervisor appropriately	2	2
C.06	Cooperate with co-workers in the completion of assignments	3	2

DUTY D: Professional Communications (2 questions)

CODE	TASK	F	C
D.01	Develop and use proper and professional communication skills with staff, patients and families	3	2
D.02	Use proper technique and etiquette for answering the telephone	2	2
D.03	Inform patients of special test requirements	3	3

DUTY E: Clerical Skills and Duties (4 questions)

CODE	TASK	F	C
E.01	Chart or file laboratory-generated reports properly	2	3
E.02	Enter, retrieve and verify patient collection data and special notations using appropriate sources	3	3
E.03	Maintain inventor levels, order and restock supplies	2	2
E.04	Enjoy computer skills	2	2

DUTY F: Safety Standards and Procedures (11 questions)

CODE	TASK	F	C
F.01	Identify appropriate regulatory and standard-setting agencies	2	2
F.02	Know the safety data sheets	2	2
F.03	Employ universal/standard precautions	3	3
F.04	Employ infection control and isolation techniques	3	3
F.05	Recognize patient problems related to syncope, nausea and other complications	2	3

DUTY G: Legal, Ethical and Professional Considerations (7 questions)

CODE	TASK	F	C
G.01	Know principles of liability regarding the practice of phlebotomy	2	3
G.02	Perform duties professionally, ethically and legally, adhering to criminal justice and civil rights acts	3	3
G.03	Employ professional conduct and appearance in the performance of duties	3	2

DUTY H: Terminology, Anatomy and Physiology (8 questions)

CODE	TASK	F	C
H.01	Employ basic terminology including suffixes, prefixes and root words	3	2
H.02	Know basic anatomy	3	2
H.03	Know basic physiological systems	3	2

Sample Questions

_____ 1. In the medical assisting field, the acronym SOAP represents:

      a. subjective, objective, assessment, plan.
      b. subjective, onset, activity, plan.
      c. symptom, onset, assessment, plan
      d. symptom, objective, assessment, plan

_____ 2. Which of the following terms refers to a collection of fluid in the scrotal sac?

      a. balanitis
      b. epididymitis
      c. hydrocele
      d. prostatic hypertrophy

_____ 3. When notifying a client of a past due balance on a monthly statement, which classification of mailing should be used?

      a. certified
      b. first class
      c. priority
      d. registered

_____ 4. The presence of antibody B and antigen A on RBC results indicate which blood type?

      a. A
      b. B
      c. O
      d. AB

_____ 5. Nagele's Rule is used to determine:

      a. blood count.
      b. expected due date.
      c. pediatric BMI.
      d. percentage of burns.

_____ 6. What is the correct order of parenteral routes from fastest to slowest absorption rate?

      a. IV, ID, SC, IM
      b. IV, IM, ID, SC
      c. IV, IM, SC, ID
      d. IV, SC, IM, ID

_____ 7. Who provides an interpreter for a patient who is hearing impaired?

    a. disability representative
    b. medical office
    c. patient
    d. SSI

_____ 8. When giving new employees instructions on taking emergency calls, instruct them to:

    a. answer questions within their scope of training.
    b. have the caller call 911 immediately.
    c. take the caller's name, number and a message; then talk to the doctor.
    d. use the procedure manual for phone triage.

_____ 9. The physician asks the medical assistant to convert 30 grains of medication into the metric system. Which of the following represents the correct conversion?

    a. 1 gram
    b. 1 ounce
    c. 2 drams
    d. 2 grams

_____ 10. At what point does the medical assistant check the shipping invoice after receiving new supplies?

    a. at the time of the receipt of merchandise
    b. monthly at a staff meeting
    c. once a week
    d. once a year when doing inventory

Sample Questions — Key

1. In the medical assisting field, the acronym SOAP represents:

    a. subjective, objective, assessment, plan.   Correct
    b. subjective, onset, activity, plan.   Incorrect
    c. symptom, onset, assessment, plan   Incorrect
    d. symptom, objective, assessment, plan   Incorrect

2. Which of the following terms refers to a collection of fluid in the scrotal sac?

    a. balanitis   Incorrect
    b. epididymitis   Incorrect
    c. hydrocele   Correct
    d. prostatic hypertrophy   Incorrect

3. When notifying a client of a past due balance on a monthly statement, which classification of mailing should be used?

    a. certified   Incorrect
    b. first class   Correct
    c. priority   Incorrect
    d. registered   Incorrect

4. The presence of antibody B and antigen A on RBC results indicate which blood type?

    a. A   Correct
    b. B   Incorrect
    c. O   Incorrect
    d. AB   Incorrect

5. Nagele's Rule is used to determine:

    a. blood count.   Incorrect
    b. expected due date.   Correct
    c. pediatric BMI.   Incorrect
    d. percentage of burns.   Incorrect

6. What is the correct order of parenteral routes from fastest to slowest absorption rate?

    a. IV, ID, SC, IM   Incorrect
    b. IV, IM, ID, SC   Incorrect
    c. IV, IM, SC, ID   Correct
    d. IV, SC, IM, ID   Incorrect

7. Who provides an interpreter for a patient who is hearing impaired?

    a. disability representative   Incorrect
    b. medical office   Correct
    c. patient   Incorrect
    d. SSI   Incorrect

8. When giving new employees instructions on taking emergency calls, instruct them to:

    a. answer questions within their scope of training.   Incorrect
    b. have the caller call 911 immediately.   Incorrect
    c. take the caller's name, number and a message; then talk to the doctor.   Incorrect
    d. use the procedure manual for phone triage.   Correct

9. The physician asks the medical assistant to convert 30 grains of medication into the metric system. Which of the following represents the correct conversion?

    a. 1 gram   Incorrect
    b. 1 ounce   Incorrect
    c. 2 drams   Incorrect
    d. 2 grams   Correct

10. At what point does the medical assistant check the shipping invoice after receiving new supplies?

    a. at the time of the receipt of merchandise   Correct
    b. monthly at a staff meeting   Incorrect
    c. once a week   Incorrect
    d. once a year when doing inventory   Incorrect

Abbreviations, Symbols and Acronyms

The following is a list of abbreviations, symbols, and acronyms used in the Medical Assisting study guide and on the Medical Assisting assessments.

°	Degree
'	Feet
"	Inches
#	Number
%	Percent
ACH	Automated Clearing House
AMA	American Medical Association
AMT	The American Medical Technologists
BMI	Body Mass Index
BP	Blood pressure
BSA	Body surface area
BUN	Blood urea nitrogen
CBC	Complete blood count
cc	Cubic centimeter
CDC	Centers for Disease Control and Prevention
CD-ROM	Compact Disc Read-Only Memory
CEU	Continuing Education Unit
CHAMPVA	The Civilian Health and Medical Program of the Department of Veterans Affairs
CLIA	Clinical Laboratory Improvement Amendments
CME	Continuing Medical Education
CMS	Center for Medicare and Medicaid Services
CPR	Cardiopulmonary resuscitation
CPT	Current Procedural Terminology
CT	Computed tomography
CVA	Cerebral Vascular Accident
DEA	Drug Enforcement Administration
DRGs	Diagnosis-related group
EDC	Estimated date of confinement
EKG	Electrocardiogram
EMR	Electronic Medical Record
FDIC	Federal Deposit Insurance Corporation
FICA	Federal Insurance Contributions Act
g	Gram
gr	Grain
GTT	Glucose tolerance test
HCFA	Health Care Financing Administration
HCG	Human chorionic gonadotropin
HCPCS	Common Procedure Coding System
HEENT	Head, Eye, Ear, Nose and Throat
HIPAA	Insurance Portability and Accounting Act
HIV	Human Immunodeficiency Virus
hr	Hour
HMO	Health Maintenance Organization

ICD-10	International Classification of Diseases 10
ID	Identification
ID	Intradermal
IEP	Individualized Education Plan
IM	Intramuscular
IRS	Internal Revenue Service
IV	Intravenous
kg	Kilogram
L	Liter
lbs	Pounds
Mg	Milligram
mL	Milliliter
MRSA	Methicillin-resistant Staphylococcus
NCCA	National Commission for Certifying Agencies
NPO	Nothing by mouth
oz	Ounce
PC	Personal Computer
PDR	Physician's Procedural Terminology
PO	By mouth
POCT	Point-of-care testing
PPO	Preferred Provider Organization
Prep	Prepare
PRN	As needed
q	Every day
RBC	Red blood cell
RBRVS	Resource-based relative value scale
SC	Subcutaneous
SDS	Safety Data Sheets
SSI	Supplemental Security Income
STAT	Sooner than already there
tbls	Tablespoon
tsp	Teaspoon
WBC	White blood cell
X-ray	X-radiation

Test Taking Strategies

This section of the study guide contains valuable information for testing success and provides a common-sense approach for preparing for and performing well on any test.

General Testing Advice

1. Get a good night's rest the night before the test — eight hours of sleep is recommended.
2. Avoid junk food and "eat right" several days before the test.
3. Do not drink a lot or eat a large meal prior to testing.
4. Be confident in your knowledge and skills!
5. Relax and try to ignore distractions during the test.
6. Focus on the task at hand — taking the test and doing your best!
7. Listen carefully to the instructions provided by the exam proctor. If the instructions are not clear, ask for clarification.

Testing Tips

1. Read the entire question before attempting to answer it.
2. Try to answer the question before reading the choices. Then, read the choices to determine if one matches, or is similar, to your answer.
3. Do not change your answer unless you misread the question or are certain that your first answer is incorrect.
4. Answer questions you know first, so you can spend additional time on the more difficult questions.
5. Check to make sure you have answered every question before you submit the assessment for scoring — unanswered questions are marked incorrect.

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