

MEDICAL OFFICE MANAGEMENT
Curriculum Content Frameworks

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MEDICAL OFFICE MANAGEMENT

Grade Levels: 10-12
Course Code: 492690
Units of Credit: 1

Prerequisites: Computer Business Applications
or Computer Applications I and II
Introduction to Health Informatics
Medical Terminology

Course Description: Medical Office Management is a two-semester course focusing on management and supervision in the Health Informatics office environment. The course covers basic skills in word processing, database, spreadsheet, presentation, desktop publishing, 10-key calculating, record keeping, communicating and transcribing, as well as decision making, critical thinking, teamwork and ethics.

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Unit 1: Technology

Hours: 20

Terminology: Animation, Cell, Column, Copier, Data, Database, Database management, Data processing, Desktop publishing, Facsimile, Field, Formula, Presentation software, Query, Record, Row, Scanner, Slide, Spreadsheet, Transitions, Word processing

- 1.1 Define terminology related to medical terminology
 - 1.1.1 Prepare a list of terms with definitions
- 1.2 List software applications used for medical office technology
 - 1.2.1 Make a hard copy of software applications used for medical office technology, using word processing software
- 1.3 Describe the need for word processing
 - 1.3.1 Decide which types of data are used with word processing
 - 1.3.2 Key business documents (i.e., memos, letters, reports, tables)
- 1.4 Describe the word processing activities performed in a medical office
 - 1.4.1 Discuss in class the various word processing activities performed in a medical office
- 1.5 Describe the need for databases
 - 1.5.1 Discuss in class which types of data are used for database activities
- 1.6 Identify the database activities performed in a medical office
 - 1.6.1 Create a database structure (table); key in data
 - 1.6.2 Generate database queries
- 1.7 Describe the need for spreadsheets
 - 1.7.1 Discuss in class the need for spreadsheets in a medical office environment
- 1.8 Identify the spreadsheet activities performed in a medical office
 - 1.8.1 Create a spreadsheet with data and formulas
- 1.9 Describe the need for presentation software
 - 1.9.1 Discuss in class the need for presentation software in a medical office environment
- 1.10 Identify the presentation activities performed in a medical office
 - 1.10.1 Develop a presentation that includes multiple slides with text and graphics
- 1.11 Describe the need for desktop publishing software
 - 1.11.1 Discuss in class the need for desktop publishing in a medical office environment
- 1.12 Identify the desktop publishing activities performed a medical office
 - 1.12.1 Create a desktop publishing document (i.e., flyer, announcement, brochure)
- 1.13 Demonstrate the combination of word processing, spreadsheets, data processing, desktop publishing and presentations

- 1.13.1 Key documents to combine two or more of the following applications: word processing, spreadsheets, data processing, desktop publishing and presentations
- 1.14 Name uses of a 10-key calculator or computer numeric keypad
 - 1.14.1 Apply uses of calculator or computer numeric keypad
- 1.15 Identify proper hand position using the touch system on the 10-key calculator or computer numeric keypad
 - 1.15.1 Demonstrate the 10-key calculator or computer numeric keypad proficiency
- 1.16 List various equipment used in the automated medical office
 - 1.16.1 Determine appropriate office equipment relating to various office activities (i.e., scanner, fax, copier, digital camera, camcorder, etc.)

Unit 2: Human Relations

Hours: 10

Terminology: Emergency procedure plan, Ergonomics, Ethics, Fraud, Gossip, Home office, Insubordination, Mobile office, Occupational Safety & Health Administration (OSHA), Piracy, Self-assessment, Sexual harassment, Short-term goals, Social behavior, Stress, Teamwork, Traditional office, Virtual office

- 2.1 Define terminology associated with human relations
 - 2.1.1 Prepare a list of terms with definitions
- 2.2 Describe the different types of offices (i.e., mobile, traditional, home, virtual)
 - 2.2.1 Analyze various office activities associated with the different types of offices
- 2.3 Identify acceptable/unacceptable office behavior
 - 2.3.1 Compose a list of acceptable office behaviors (i.e., teamwork, attitude, communications, cooperation, loyalty, ethical behavior)
 - 2.3.2 Compose a list of unacceptable social behaviors (i.e., sexual harassment, gossip, insubordination, office politics)
 - 2.3.3 Analyze social behavior situations
- 2.4 Identify ethical practices found in the workplace
 - 2.4.1 Compose a list of acceptable ethical behaviors (i.e., trustworthiness, honesty, integrity)
 - 2.4.2 Compose a list of unacceptable ethical behaviors (i.e., piracy, stealing, fraud)
- 2.5 Identify concepts relating to teamwork (i.e., responsibilities, leadership, goal setting, purpose, communication)
 - 2.5.1 Develop a project using teamwork concepts
- 2.6 List factors affecting office ergonomics (i.e., lighting, climate, workstations)
 - 2.6.1 Evaluate classroom ergonomics
 - 2.6.2 Generate plans to improve classroom ergonomics
- 2.7 Identify stress sources
 - 2.7.1 Prepare a list of personal stress sources
 - 2.7.2 Outline techniques to cope with individual sources of stress
- 2.8 Give examples of individual time management skills
 - 2.8.1 Prepare and maintain a time journal
 - 2.8.2 Outline ways to improve time management skills
- 2.9 Describe how team skills can be applied to a group project
 - 2.9.1 Form a team to develop a class project

Unit 3: Communications

Hours: 20

Terminology: : Attachment notation, Attention line, Block format, Body, Body language, Business English, Channel, Clear, Communication, Communication barrier, Communications technology, Complete, Complimentary close, Concise, Conversational English, Copy notation, Correct, Courteous, Drafting/Writing, Editing, Enclosure notation, E-mail, External barrier, Facsimile (fax), Feedback, Five Cs of communication, (coherent, clear, concise, correct, and complete), Formal speaking, Informal speaking, Internal barrier, Letter, Letter address, Letterhead, Listening, Memo, Message, Mixed punctuation, Modified block, Name of writer, Nonverbal communication, Open punctuation, Oral communication, Postscript, Prewriting/planning, Proofreader's marks, Proofreading, Receiver, Reference initials, Report, Return address, Revising/editing, Salutation, Scanner, Second-page heading, Sender, Signature line, Subject line, Tone, Two-letter state abbreviations, U.S. Postal Service (USPS) style, Verbal communication, Voice inflection, Voice mail, "You" attitude

- 3.1 Define terminology related to communication
 - 3.1.1 Prepare a list of terms with definitions

- 3.2 Describe skills essential for effective communication
 - 3.2.1 List skills essential for effective communications (listening, reading, speaking and writing)

- 3.3 Describe verbal and nonverbal communication
 - 3.3.1 List characteristics of verbal and nonverbal means of communication (i.e., clear, appropriate tone, standard language and body language)

- 3.4 Identify effective listening skills as a form of communication (i.e., focus attention and active listening)
 - 3.4.1 List the techniques of effective listening
 - 3.4.2 Apply listening techniques to listening

- 3.5 Identify barriers to effective listening (i.e., preoccupation, prejudice and distraction)
 - 3.5.1 Participate in role-playing activities and situations to increase awareness of barrier to effective listening

- 3.6 Describe formal and informal speaking skills
 - 3.6.1 List examples of formal and informal skills (i.e., group, individual)

- 3.7 Explain the proper techniques of speaking (i.e., consider the audience, express ideas clearly, and use appropriate tone)
 - 3.7.1 Prepare a speech using proper techniques
 - 3.7.2 Present a speech
 - 3.7.3 Discuss the proper etiquette when speaking on the phone
 - 3.7.4 Demonstrate phone skills
 - 3.7.5 Conduct a mock telephone conversation
 - 3.7.6 Critique a mock telephone conversation

- 3.8 Identify the types of written communication (i.e., letter, memo, report, fax, e-mail, etc)

- 3.8.1 Select appropriate types of written communication for specific situations
- 3.8.2 Prepare business documents, using the different types of written communications
- 3.9 Identify the five C's of communication (clear, concise, courteous, complete and correct)
 - 3.9.1 Apply the 5 C's to a type of written communication (i.e., write letters or memos, send and e-mail)
 - 3.9.2 List and describe the parts of a letter
 - 3.9.3 Compose a business letter
 - 3.9.4 List and differentiate between common types of business letters
 - 3.9.5 Critique various business letters
- 3.10 Identify the different types of messages used in business correspondence (i.e., persuasive, negative, neutral)
 - 3.10.1 Write persuasive, negative and neutral business correspondence
- 3.11 Describe the importance of proofreading and editing skills in a medical office
 - 3.11.1 Apply proofreading and editing rules to various forms of written communication
- 3.12 Demonstrate use of the fax machine
 - 3.12.1 Discuss special considerations when sending messages or documents with sensitive patient information using the fax machine
- 3.13 Schedule appointments
 - 3.13.1 List and discuss special considerations when scheduling patient appointments
 - 3.13.2 Discuss the proper way to handle missed appointments

Unit 4: Financial Information

Hours: 25

Terminology: Automated teller machine (ATM), Bank reconciliation, Blank endorsement, Cash, Cash over, Cash short, Check, Checking account, Commission, Deduction, Deposit, Depositor, Electronic banking, Electronic funds transfer (EFT), Employee earnings record, Endorsement in full, Gross pay, Hourly wage, Net pay, Overtime pay, Payroll, Payroll register, Petty cash record, Petty cash summary report, Petty cash system, Regular pay, Replenish, Restrictive endorsement, Salary, Signature card, Special endorsement, Time card

- 4.1 Define terminology associated with financial information
 - 4.1.1 Prepare a list of terms with definitions
- 4.2 Explain the procedure for opening a checking account
 - 4.2.1 Prepare a signature card
- 4.3 Describe the types of endorsements
 - 4.3.1 Prepare various types of endorsements (i.e., restrictive, special, blank)
- 4.4 Describe various types of banking transactions
 - 4.4.1 Prepare a deposit slip
- 4.5 Explain the process of preparing a check
 - 4.5.1 Prepare a check
- 4.6 Demonstrate the procedure of reconciling a bank statement
 - 4.6.1 Reconcile a bank statement
- 4.7 Explain the steps in preparing petty cash transactions
 - 4.7.1 Record transactions in a petty cash record
- 4.8 Describe the types of compensation plans
 - 4.8.1 Analyze and apply the types of compensation plans to various situations (i.e., salary, hourly, commission, etc.)
- 4.9 Describe the importance and purpose(s) of documented time cards
 - 4.9.1 Prepare a time card
- 4.10 Explain the various types of voluntary and required deductions relating to payroll
 - 4.10.1 Calculate FICA and income tax required deductions
 - 4.10.2 List various types of voluntary deductions
- 4.11 Describe the difference between gross pay and net pay
 - 4.11.1 Prepare a payroll register
- 4.12 Describe payroll features found on an employee earnings record
 - 4.12.1 Prepare an employee earnings record

Unit 5: Records Management

Hours: 15

Terminology: Accession log, Accountant, Accounting, Accounting clerk, Accounting equation, Accounts payable, Accounts receivable, Adjusting entry, Adjustments, Alphabetic filing, Archive, Asset, Balance sheet, Bookkeeper, Bookkeeping, Check, Chronological, Chronological order, Closing entry, Coding, Contra account, Entry-level jobs, Ethical, Expenses, File, Filing, Financial statement, Fiscal period, General journal, General ledger, General office clerk, Geographic filing, Hard copy, Income, Income statement, Indexing, Inventory, Journalizing, Label, Liability, Manual records management, Memorandum, Merchandise, Micrographics, Middle-digit filing, Numeric filing, Partnership, Petty cash, Posting, Proprietorship, Proving, Proving cash, Public accounting firm, Purchase, Receipt, Reconciling, Records management, Revenue, Sort, Subject filing, Surname, Terminal-digit filing, Transaction, Vendor, Withdrawal, Worksheet

- 5.1 Define terminology associated with record management
 - 5.1.1 Prepare a list of terms with definitions
- 5.2 Identify manual records management systems (i.e., alphabetic filing, numeric filing, geographic filing, subject filing, chronological filing, etc.)
 - 5.2.1 Solve records management problems using each of the manual records management systems
- 5.3 Describe the advantages and disadvantages of both the manual and electronic records management systems
 - 5.3.1 Compare and contrast the advantages and disadvantages of manual and electronic records management systems
- 5.4 Demonstrate the ability to complete medical records and forms (insurance, patient records, etc.)
 - 5.4.1 Discuss special considerations when completing medical records and forms
 - 5.4.2 Discuss common mistakes when completing medical records and forms
- 5.5 List and define common abbreviations used on medical forms and records
 - 5.5.1 Demonstrate the ability to read a medical record that uses common abbreviations
- 5.6 Discuss bookkeeping procedures
 - 5.6.1 Demonstrate the ability to perform selected bookkeeping procedures

Unit 6: Health Insurance Billing and Coding

Hours: 20

Terminology: Coinsurance, Copayment, Deductible, Disability Insurance, Electronic Claims Processing, Explanation of benefits, Fee Schedule, Group Health Insurance, Health Savings Account/Flexible Spending Account, Lifetime Maximum Amount, Medicaid, Medicare, Pre-existing Condition, Worker's Compensation Insurance

- 6.1 Define terminology associated to health insurance
 - 6.1.1 Prepare a list of terms with definitions
- 6.2 Discuss the life cycle of an insurance claim (i.e., claims submission, claims processing, claims adjudication, payment)
 - 6.2.1 Detail the processing of a claim by an insurance company
 - 6.2.2 Differentiate between primary and secondary insurance claims
- 6.3 Differentiate between manual and electronic claims processing
 - 6.3.1 Compare and contrast the advantages and disadvantages of manual and electronic claims processing
- 6.4 Discuss legal and ethical issues related to insurance
 - 6.4.1 Discuss HIPPA requirements related to health insurance
 - 6.4.2 Discuss common mistakes when completing insurance claim forms
 - 6.4.3 Describe why claims follow-up is important
- 6.5 Understand the processes of procedure and diagnosis coding
 - 6.5.1 Code a sample claim form
 - 6.5.2 Recognize errors in insurance claim forms

Unit 7: Medical Transcription

Hours: 10

Terminology: , CPR, Dictation, Editing, Electronic signature, Encrypted, Line counting, Medical transcriptionist (MT), Outsourcing, Overflow, Proofreading, Proofreader's Marks, Productivity, Quality, Routing/Distribution, TCP/IP (transmission control protocol), Transcription, Turnaround time (TAT), Worktype (WT)

- 7.1 Define terminology related to medical transcription
 - 7.1.1 Prepare a list of terms with definitions
- 7.2 Discuss methods of medical transcription
 - 7.2.1 Perform basic transcription procedures
- 7.3 Demonstrate the ability to proofread and correct transcribed healthcare documents
 - 7.3.1 Critique transcribed documents for form, grammar, punctuation and terminology
 - 7.3.2 Recognize, evaluate and call attention to inconsistencies, discrepancies and inaccuracies in healthcare dictation while transcribing, without altering the meaning of the dictation or changing the author's style
- 7.4 Explore the job opportunities in medical transcription and related careers
 - 7.4.1 Demonstrate an awareness of opportunities in medical transcription and related careers

Unit 8: Employment Skills

Hours: 15

Terminology: Advancement opportunities, Career advancement, Credentials, Employment application form, Follow-up letter, Fringe benefits, Government employment agency, Interview, Job search, Job termination, Letter of application, Long-term goals, Networking, Performance improvement plan, Personal leave, Portfolio, Private employment agency, Resume, Self-assessment, Short-term goals, Sick leave, Temporary employment agency

- 8.1 Define terminology related to employment skills
 - 8.1.1 Prepare a list of terms with definitions

- 8.2 Describe the importance of self-assessment
 - 8.2.1 Take the state-sponsored Kuder Career Portfolio self-assessment options (or similar self-assessment) to evaluate careers
 - 8.2.2 Research the industry to determine basic facts and competitive salary information based on the results obtained from the self-assessment of career options
 - 8.2.3 Prepare a monthly budget to determine if a preliminary career choice will meet financial needs

- 8.3 Explain the importance of setting career goals (i.e., short- and long-term goals)
 - 8.3.1 Design short-and long-term career goals

- 8.4 Describe the different sources to learn about job openings (i.e., networking, newspaper, personal inquiry, agencies)
 - 8.4.1 Search job vacancies, using sources such as the World Wide Web, newspaper, agencies, etc.

- 8.5 Discuss the similarities and differences of various employment agencies (government, private, temporary)
 - 8.5.1 Compare and contrast the similarities and differences of various employment agencies

- 8.6 Discuss credentials, resume, letter of application, employment application and portfolio
 - 8.6.1 Prepare a resume, letter of application, employment application and portfolio

- 8.7 Discuss the Dos and DON'Ts in a job interview
 - 8.7.1 Participate in mock interview

- 8.8 Describe the purpose and importance of a follow-up letter
 - 8.8.1 Prepare a follow-up letter

- 8.9 Identify items covered in a job orientation (i.e., fringe benefits, personal leave, sick leave and job termination)
 - 8.9.1 List various fringe benefits, reasons for personal leave and sick leave and reasons for job termination

- 8.10 Identify ways that employees are evaluated

- 8.10.1 Make a list of evaluation items on which employees are evaluated
- 8.11 Describe a career advancement and performance improvement plan
 - 8.11.1 Prepare a plan of action for career advancement and performance improvement plan

Unit 9: Career and Technical Student Organizations (FBLA/HOSA)

Hours: 10

Terminology: Assess, Assessment, Behavior, Business meeting, Career, Competency, Critique, Cultural diversity, Customer, Equity issue, Expectation, Government, Image, Interview, Job application, Journal, Management, Mentor, Organizational chart, Parliamentary procedure, Portfolio, Presentation, Professional organization, Résumé, Self-motivation, Short-term goals, Stress, Task, Trade union

- 9.1 Define terminology related to career and technical student organizations
 - 9.1.1 Prepare a list of terms with definitions
- 9.2 Identify individual learning styles
 - 9.2.1 Outline individual self-assessed learning styles
- 9.3 Describe self-motivation techniques
 - 9.3.1 Establish short-term self-motivation goals
- 9.4 Discuss community service projects
 - 9.4.1 Identify the benefits of doing a community service project
 - 9.4.2 Participate in a community service project
- 9.5 Explore community jobs related to the Health Informatics field
 - 9.5.1 Participate in a job shadowing activity
 - 9.5.2 Schedule guest speakers in the area of Health Informatics
- 9.6 Define business meeting skills
 - 9.6.1 Outline how to observe and critique a business meeting
 - 9.6.2 Conduct a mock business meeting
- 9.7 Review professional Health Informatics journals
 - 9.7.1 Develop a three- to five-minute presentation from an article in a professional journal

Glossary

Unit 1: Technology

1. Animation – the movement of slides and slide elements on and off the screen during an electronic slide show
2. Cell – the intersection of a row and column in a worksheet or a table
3. Column – information appearing vertically in a worksheet and identified by letters at the top of the worksheet window
4. Copier – an electronic device that produces copies directly from an original
5. Data – raw input to be processed by a computer
6. Database – a collection of related information
7. Database management – organizing, storing, and manipulating large amounts of information
8. Data processing – the collecting, organizing, and summarizing of data
9. Desktop publishing – the process of combining text and graphics, using a computer, to create attractive documents
10. Facsimile (fax) – technology that transfers images electronically using telephone lines
11. Field – a single piece of information in a data file
12. Formula – equation that calculates a new value from values currently on a worksheet
13. Presentation software – software used to create slides, stacks, audio clips, animations, and full-motion sequences
14. Query – a search method that allows complex searches of a database
15. Record – a complete set of data
16. Row – information appearing horizontally in a worksheet and identified by numbers on the left side of the worksheet window
17. Scanner – a device that allows photographs and text to be electronically imaged into computer files
18. Slide – one sheet or window in presentation software
19. Spreadsheet – grid of rows and columns containing numbers, text, and formulas
20. Transitions – the way a slide appears or disappears during an on-screen slide show

21. Word processing – the use of a computer and software to produce written documents

Unit 2: Human Relations

1. Emergency procedure plan – carefully planned steps to follow in case of trouble or danger
2. Ergonomics – the study of the effects of the work environment on the health and well-being of employees
3. Ethics – a system of moral standards or values
4. Fraud – intentional deception to cause a person or business to give up property (assets) or some lawful right
5. Gossip – usually incomplete and/or false statements about individuals or situations that may be harmful to the company or its employees
6. Home office – space within a person’s home that is organized for the efficient performance of office tasks
7. Insubordination – failure to follow orders or instructions; refusal to do what is commanded
8. Mobile office – an establishment defined by its ability to accomplish business activities in a temporary environment
9. Occupational Safety and Health Administration (OSHA) – provides research, information, education, and training in the field of occupational safety and health
10. Piracy – unauthorized copying of a computer program that has been written by someone else
11. Self-assessment – a personal evaluation of one’s strengths and weaknesses
12. Sexual harassment – any unwanted and offensive sexual look, comment, suggestion, or physical contact that causes discomfort in the workplace
13. Short-term goals – goals or targets that are reachable within a short or brief period of time
14. Social behavior – good manners, appropriate language, appropriate dress, and general conduct outside of the office environment
15. Stress – the body’s reaction to any stimulus that requires a person to adjust to a changing environment
16. Teamwork – cooperative effort by the members of a group to achieve a common goal
17. Traditional office – a permanent place where the operations of the business, professional person, or organization take place

18. Virtual office – the capability to perform work activities away from a traditional office setting

Unit 3: Communications

Attachment notation – indicates that another document is attached to a letter

Attention line – directs your document to a certain person or department within a company

Block format – all parts of a letter (including paragraphs) begin at the left margin

Body – the paragraphs that make up the main message

Body language – the posture, body movements, gestures, and facial expressions that serve as nonverbal communication

Business English – the language used in a business environment

Clear – easily heard, seen, or understood

Communication – the exchange of thoughts, messages, or information or the process used to send and interpret messages

Communication barrier – aspect of or condition in a workplace that interferes with effective exchange of ideas or thoughts; such barriers include status differences, gender differences, cultural differences, prejudices, and the organizational environment

Communications technology – the use of electronic/digital devices to communicate

Complete – provides all the information necessary for the message to be understood

Complimentary close – the ending or the farewell of the letter

Concise – brief, to the point, short

Conversational English – the language used in an informal, non-business setting

Copy notation – indicates that a duplicate of a letter is being sent to someone other than the addressee

Correct – means that the information in a document is accurate and up-to-date

Courteous – positive, considerate, bias-free

Drafting/writing – the stage of the writing process during which writers use prewritten/planning notes or organizational tools as they write their message into sentences and paragraphs

Editing – the process of making changes to refine a document

E-mail – the electronic transfer of messages using computers and software

Enclosure notation – indicates that another document accompanies a letter

External barrier – an obstacle to communication that lies outside the receiver or sender (i.e., temperature, lighting, noise, and comfort)

Facsimile (fax) – technology that transfers images electronically using telephone lines

Feedback – the response of a receiver to a message

Five Cs of communication (coherent, clear, concise, complete, and correct) – the basic concerns for efficiency and effectiveness in writing in the business world

Formal speaking – communication situations that people can prepare for ahead of time, such as interviews, group discussions, and speaking engagements

Informal speaking – the casual, unstructured situation in which most communication occurs, such as giving and receiving messages in casual or person-to-person interaction

Internal barrier – an obstacle to communication that lies within the receiver or sender (i.e., personalities, backgrounds, cultures, status, and biases)

Letter – a business document used to communicate with an individual or a group outside an organization

Letter address – the location to which correspondence is being sent

Letterhead – stationery that has information such as the company name, address, and telephone number printed on it

Listening – a mental process as well as the physical aspects of hearing or the process of hearing and focusing attention to understand and remember an oral message

Memo – a streamlined business document used to communicate with an individual or a group within an organization; also called a memorandum

Message – a set of symbols selected to represent a thought or an idea

Mixed punctuation – a punctuation style for letters in which there is a colon following the salutation/greeting and a comma following the complimentary close

Modified block – every line of this letter format starts flush with the left margin with a blank line between paragraphs; the address and signature blocks are lined up slightly to the right of the middle of the page

Name of writer – the author of the document; keyed a quadruple space below the complimentary close

Nonverbal communication – communication that does not use words, including various movements of the total body such as facial expressions, gestures of hands and arms, and posture

Open punctuation – no punctuation following the salutation or the complimentary close

Oral communication – spoken communication

Postscript – additional text that may be added after a letter has been completed; can be used to include a personal message in a business letter

Prewriting/planning – the stage of the writing process during which writers plan their message

Proofreader's marks – symbols or codes used to highlight an error and to indicate that a correction needs to be made

Proofreading – the stage of the writing process in which the writer reviews and corrects the final draft of a written message carefully for errors or omissions

Receiver – a person or thing to whom a message is sent; the audience

Reference initials – indicate who keyed the document; keyed a DS below the writer's name, title, or department

Report – a presentation of organized information that will be used by the reader for a specific purpose

Return address – the location of the person sending the letter

Revising/editing – the stage of the writing process during which writers make changes to a written message

Salutation – the greeting of the letter; keyed a double space below the letter address

Scanner – a device that allows photographs and text to be electronically imaged into computer files

Second-page heading – information identifying the second page (and all additional pages) of a report; includes the page number and may include the title and/or date the report was prepared

Sender – a person or thing that originates an idea or initiates the communication process

Signature line – the signature of the originator of the message that is signed between the complimentary close and the writer's name

Subject line – the topic discussed in the document placed in all capital letters a double space below the salutation

Tone – the general effect a message creates

Two-letter state abbreviations – standard state abbreviations, preferred by the U.S. Postal Service, that consist of two letters in all capital letters

U.S. Postal Service (USPS) style – the style preferred by the USPS to be used on envelopes for the return address and mailing address

Verbal communication – communication that uses words, which can be either written or oral

Voice inflection – modulation of the voice; change in pitch or tone of voice

Voice mail – a messaging system that uses computers and telephones to record, send, store, and retrieve voice messages

“You” attitude – focuses on the needs, interests, and concerns of the receiver

Unit 4: Financial Information

Automated Teller Machine (ATM) – an electronic machine from which cash deposits and withdrawals can be made

Bank reconciliation – bringing into agreement a bank statement with a party's cash account records

Blank endorsement – an endorsement that consists only of the endorser's signature on the back of a check

Cash – refers both to actual cash (coins and bills), checks, money orders, and funds in checking accounts in a banking institution

Cash over – relating to a petty cash system by which there is a cash discrepancy showing more money on hand than the related records indicate

Cash short – relating to a petty cash system by which there is a cash discrepancy showing less cash on hand than the related records indicate

Check – a written order to a bank to make payment against the depositor's funds in that bank

Checking account – a bank account from which payments can be ordered by a depositor

Commission – a fee paid to an employee, usually based on a percentage of the value of what the employee sells or processes

Deduction – an item that reduces gross pay earned by an employee

Deposit – the placement of cash (coins, bills, checks) into an account

Depositor – the individual who places cash (coins, bills, checks) into an account

Electronic banking – use of a computer and a telecommunications network to transfer funds from one fund to another

Electronic Funds Transfer (EFT) – the use of a computer and a telecommunications network to transfer funds from one party to another

Employee earnings record – a business form used to record details affecting payments made to an individual employee

Endorsement in full – an endorsement found on the back of a check indicating the new owner of a check; also known as a special endorsement

Gross pay – the salary paid to an employee before any deductions are withheld

Hourly wage – the amount of money an employee earns for each hour of work

Net pay – the total earnings paid to an employee after payroll taxes and other deductions are withheld

Overtime pay – the amount of pay an employee receives as an incentive for working over the regular work day or work week

Payroll – the total amount earned by all employees for a pay period

Payroll register – a business form used to record payroll information on all employees for a pay period

Petty cash record – a form used in a petty cash system to record all disbursements and receipts

Petty cash summary report – a form system used in a petty cash system used to summarize expenditures

Petty cash system – a system established by a business that keeps a small amount of cash on hand for making small payments

Regular pay – an amount paid to an employee for performing work, excluding overtime pay and commission earned

Replenish – relating to a petty cash system by which the cash box amount is restored to its original level

Restrictive endorsement – an endorsement found on the back of a check restricting further transfer of a check's ownership

Salary – the money paid for employee services

Signature card – a bank document prepared by an account holder that is a key to the bank account security that documents who may sign checks on particular bank accounts

Special endorsement – an endorsement indicating a new owner of a check; also known as an endorsement in full

Time card – a card that is required of employees to record their arrival and departure times for payroll purposes

Unit 5: Records Management

Accession log – a list of numbers assigned in a numeric filing system

Accountant – a person who handles a broad range of jobs related to the making of choices and decisions about the design for a business accounting system and the preparation and explanation of financial reports

Accounting – planning, recording, analyzing, and interpreting financial activities

Accounting clerk – entry-level job that can vary with the size of the company from specialization in one part of the system to a wide range of recordkeeping tasks

Accounting equation – an equation showing the relationship among assets, liabilities, and owner's equity

Accounts payable – the amount of money owed, or payable, to the creditors of a business

Accounts receivable – the total amount of money owed to a business

Adjusting entry – journal entries recorded to update general ledger accounts at the end of a fiscal period

Adjustments – an amount that is added to or subtracted from an account balance to bring the balance up to date

Alphabetic filing – filing records alphabetically according to letters and words (names, subjects, or geographic locations) that are used as captions on the guides and folders

Archive – storage area that is dedicated to organizing and preserving records

Asset – anything of value that is owned

Balance sheet – a financial statement that reports assets, liabilities, and owner's equity on a specific date

Bookkeeper – a person who keeps regular, concise, accurate records of business transactions by entering them in account books

Bookkeeping – the process of keeping regular, concise, accurate records of business transactions by entering them into account books

Check – a written order to a bank to make payment against the depositor's funds in that bank

Chronological – arranged in or according to the order of time

Chronological order – the filing of records according to date

Closing entry – journal entries used to prepare temporary accounts for a new fiscal period

Coding – the process of marking a symbol or other identification on the record to indicate how it is indexed

Contra account – an account whose balance decreases another account's balance

Entry-level jobs – the first jobs that individuals get

Ethical – conforming to accepted and established professional standards of conduct

Expenses – a decrease in owner's equity from the operation of a business

File – a collection of related information treated as a unit

Filing – the process of storing office records in an orderly manner within an organized system

Financial statement – a report prepared to summarize the changes resulting from business transactions that occur during an accounting period

Fiscal period – the length of time for which a business summarizes and reports financial information

General journal – a journal with two amount columns in which all kinds of entries can be recorded

General ledger – a ledger that contains all accounts needed to prepare financial statements

General office clerk – may be in charge of a small cash fund, file accounting records, type accounting reports

Geographic filing – filing records according to geographic location

Hard copy – a paper printout

Income – a gain measured in money that derives from capital or labor; also the amount of such gain received by an individual in a given period of time

Income statement – a financial statement showing the revenue and expenses for a fiscal period

Indexing – the process of deciding how to identify a record to be filed

Inventory – the amount of goods on hand

Journalizing – recording transactions in a journal

Label – written or keyed captions used to identify folders, guides, or file drawers in a paper filing system

Liability – an amount owed by a business

Manual records management – a set of procedures used to organize, store, retrieve, remove, and dispose of paper records

Memorandum – a form on which a brief message is written describing a transaction

Merchandise – goods that a merchandising business purchases to sell

Micrographics – documents reduced in size and stored on film

Middle-digit filing – method of numeric filing in which the middle two or three digits of each record number are used as the primary division under which each record is filed

Numeric filing – arranging records by numbers

Partnership – a business in which two or more people combine their assets and skills

Petty cash – an amount of cash kept on hand and used for making small payments

Posting – transferring information from a journal entry to a ledger account

Proprietorship – a business owned by one person

Proving – determining that amounts are in agreement or in balance

Proving cash – determining that the amount of cash agrees with the accounting records

Public accounting firm – a business selling accounting services to the general public

Purchase – to gain possession by paying money or the equivalent

Receipt – a business form giving written acknowledgment for cash received

Reconciling – verifying that information on a bank statement and a checkbook are in agreement

Records management – management and control of all of a business's records (paper and paperless) from receipt or creation, through processing, storage, retrieval, and disposal

Revenue – an increase in owner's equity resulting from the operation of a business

Sort – a preliminary step in filing that involves separating items into categories prior to the actual filing of documents into designated folders/files

Subject filing – records arranged by topic

Surname – the last name of an individual

Terminal-digit filing – a kind of numeric filing in which the last two or three digits of each record number serve as the primary division under which a record is filed

Transaction – a business activity that changes assets, liabilities, or owner's equity

Vendor – a business from which merchandise is purchased or supplies or other assets are bought

Withdrawal – assets taken out of a business for the owner's personal use

Worksheet – a columnar accounting form used to summarize the general ledger information needed to prepare financial statements

Unit 6: Health Insurance Billing and Coding

Coding – process of reporting diagnoses, procedures, and services as numeric and alphanumeric characters on the insurance claim

Coinsurance – also called coinsurance payment: the percentage the patient pays for covered services after the deductible has been met and the copayment has been made

Copayment – provision in an insurance policy that requires the policyholder or patient to pay a specified dollar amount to a health care provider for each visit or medical service received

Deductible – amount for which the patient is financially responsible before an insurance policy provides coverage

Disability Insurance – reimbursement for income lost as a result of temporary or permanent illness or injury

Electronic claims processing – sending data in a standardized machine-readable format to an insurance company via disk, telephone, or cable.

Explanation of benefits – report that details the results of processing a claim

Fee schedule – list of predetermined payments for health care services provide to patients

Group health insurance – health insurance available through employers; employers usually pay part, or all of premium costs

Health savings account/flexible spending account – participants enroll in a relatively inexpensive, high-deductible insurance plan and is a tax deductible savings account to cover

Lifetime maximum amount – maximum benefit payable to a health plan participant

Medicaid – cost sharing program between the federal and state governments to provide health care services to low income Americans

Medicare – reimburses health care services to Americans over the age of 65

Pre-existing condition – any medical condition that was diagnosed and/or treated within a specified period of time immediately preceding the enrollee's effective date

Worker's Compensation Insurance – insurance program mandated by federal and state governments that requires employers to cover medical expenses and loss of wages for workers who are injured on the job or who have developed job related disorders

Unit 7: Medical Transcription

Author – writer or composer of the original document

CPR – computer-based patient record

Dictation – the dictating of words for another to write down

Editing – to prepare material for publication or presentation, as by correcting, revising, or adapting

Electronic signature – a signature that consists of one or more letters, characters, numbers, or other symbols in digital form incorporated in, attached to, or associated with an electronic document

Encrypted – to alter (a file, for example) using a secret code so as to be unreadable to unauthorized parties

Line counting – units or measurements that can be clearly and consistently verified within medical transcription (example: character, word, or line)

Medical transcriptionist, acronym MT (medical language specialist) – individual that has obtained necessary education to translate medical dictation into meaningful legible communication

Outsourcing – the process by which a healthcare organization contracts with a medical transcription company to transcribe documents

Overflow – a workload volume beyond normal demand which may require outsourcing

Proofreading – the stage of the writing process in which the writer reviews and corrects the final draft of a written message carefully for errors and omissions

Proofreader's marks – symbols or codes used to highlight an error and to indicate that a correction needs to be made

Productivity – level of accomplishment

Quality – a valid quality assurance process to ensure that medical transcription practices are as consistent and accurate as possible

Routing/Distribution – the mechanism customized to deliver transcribed documents.

Routing/distribution methods include printing to a printer (TCP/IP), email (encrypted), fax, batch (sent in batches at periodic intervals), document upload

TCP/IP (transmission control protocol) – a protocol developed for the Internet to get data from one network device to another

Transcription – the process of transferring information from oral or written format to digital format

Turnaround time, acronym TAT – the measurement between the time the dictation is closed (ready for transcription) and the time the medical transcriptionist completes the dictation

Worktype (WT) – the type of report dictated, i.e., history and physical, consultation, operative report, progress note, etc. WTs typically have a number assigned to them

Unit 8: Employment Skills

Advancement opportunities – possibilities for promotion in rank or position

Career advancement – promotions or job changes that offer increased responsibility and salary increases

Credentials – evidence of training, education, and/or experience

Employment application form – standard form provided by employer to assess basic skill level and educational background of applicant

Follow-up letter – a letter that the interviewed applicant writes expressing interest in the job, appreciation for the time of the interviewer, and any additional qualifications not discussed in the interview; a thank you letter

Fringe benefits – an equivalent to a payment over and above the basic wage paid by an employer (i.e., paid holiday, pension contribution, paid holiday, health insurance, dental insurance, etc.)

Government employment agency – provides job-search services to citizens and employers free of charge

Interview – a question-and-answer session conducted by the employer to screen and eventually hire applicants

Job search – identification of jobs for which one is qualified and then securing such a position through a variety of resources, including friends, family contacts, professional associations, career services, and academic mentors

Job termination – ending of employment because of misconduct, lack of skills, or downsizing

Letter of application – a letter to accompany résumé that professionally introduces an applicant to decision makers and briefly explains why this applicant warrants an interview; a “cover letter”

Long-term goals – aims or plans for the next three to five years

Networking – making and maintaining connections among people or groups that a person comes in contact with

Performance improvement plan – a plan written by the supervisor and agreed to by the employee as a measure for performance improvement; used in termination proceedings if improvement goals are not met

Personal leave – a temporary absence from work ranging from one day to several weeks, depending upon company policies and procedures

Portfolio – samples of assignments and/or professional work, achievements/awards, letters of recommendation, and other professional-quality items that would support the statements made in a résumé and demonstrate competencies in an interview

Private employment agency – provides job-search services to individuals and employers for a fee, usually a percentage of the first year's salary

Resume – organized listing of personal contact information, work experience, education information, school/activities/professional organizations, and references

Self-assessment – a personal evaluation of one's strengths and weaknesses

Short-term goals – goals or targets that are reachable within a short or brief period of time

Sick leave – leave of absence from duty granted because of illness; absence with pay for time lost due to a bona fide nonwork-related illness or injury, pregnancy, or medical appointment as defined in the employer's personnel policies

Temporary employment agency – provides workers to fill temporary jobs that last for periods from one day to months

Unit 9: Career and Technical Student Organizations (FBLA/HOSA)

Assess – to determine the value, significance, or extent; to judge

Assessment – a tool used to determine value, significance, or extent

Behavior – the actions one takes; how one conducts oneself

Business meeting – planned gathering of individuals (occupational, work, trade, or organizational) that is methodical and systematic; the meeting is for a common purpose

Career – a series of related jobs built on a foundation of interest, knowledge, training and experience

Competency – the knowledge that enables one to comprehend and complete a task

Critique – a critical review or commentary

Cultural diversity – integrated existence of ethnic groups based on their values, beliefs, and behavior patterns (social, educational, economic, religious, and artistic values)

Customer – one who buys good or services

Equity issue – a point of matter affecting the justice and fairness for all concerned

Expectation – eager anticipation; to look forward to the probably occurrence or appearance of something

Government – agency that authorizes and directs business actions and policies

Image – the public's opinion or concept of something

Interview – a question-and-answer session conducted by the employer to screen and eventually hire applicants

Job application – a form or document used by an employer when hiring prospective employees

Journal – a personal record of occurrences, experiences, or reflections kept on a regular basis

Management – the person or people who control or direct a business or other enterprise

Mentor – a person who acts as a coach or advisor

Organizational chart – a visual that is used to display the structure and interrelations among personnel and departments within a business

Parliamentary procedure – a body of rules governing a meeting

Portfolio – samples of assignments and/or professional work, achievements/awards, letters of recommendation, and other professional-quality items that would support the statements made in a resume and demonstrate competencies in an interview

Presentation – a performance; a formal introduction; the process of offering for consideration or display

Professional organization – groups established to provide opportunities for workers to learn behaviors that enable them to do the best job possible to provide and maintain high quality service to employers and patients

Resume – organized listing of personal contact information, work experience, education information, school/activities/professional organizations, and references

Self-motivation – ability to begin or to follow through with a task without the assistance of others

Short-term goals – goals or targets that are reachable within a short or brief period of time

Stress – the body's reaction to any stimulus that requires a person to adjust to a changing environment

Task – a function to be performed

Trade union – a labor union limited in membership to people in the same trade