

# The Professional Medical Assistant

Chapter 2

# Learning Objectives

## Lesson 2.1: The Professional Medical Assistant

(Slide 1 of 3)

1. Describe the history of the medical assisting profession.
2. Explain how a medical assisting education program becomes accredited.
3. Differentiate between various national credentials for medical assistants.
4. List character and personality traits of effective medical assistants.

# Learning Objectives

## Lesson 2.1: The Professional Medical Assistant

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5. Describe the appearance and behavior of a professional medical assistant.
6. Describe principles of effective time management.
7. Define professionalism for physicians and medical assistants.
8. Identify organizations and publications that guide professional behavior for medical assistants and physicians.
9. Describe how professional organizations support the profession of medical assisting.

# Learning Objectives

## Lesson 2.1: The Professional Medical Assistant

(Slide 3 of 3)

10. Identify the administrative tasks and clinical tasks performed by a medical assistant.
11. Discuss the medical assistant's role in the operation of the medical office and patient education.
12. List employment opportunities for medical assistants.

# Introduction to Professional Medical Assisting

(Slide 1 of 3)

- ▶ Medical practice before 1960s
  - ▶ Early medical practices were mostly solo practices
  - ▶ Physician performed most duties within the office
  - ▶ Physician also made house calls
  - ▶ Patients often seen without appointments

# Introduction to Professional Medical Assisting

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- ▶ Gradual increase in scope and complexity of ambulatory care over the past 70 years have impacted the medical assistant role including:
  - ▶ Government programs and insurance companies required offices to submit insurance claims
  - ▶ Administrative equipment and technology use
  - ▶ More documentation requirements
  - ▶ More diagnostic testing done in the office
  - ▶ More patients are seen in the office with more complex needs
  - ▶ Nurses did not want to do clerical work

# Introduction to Professional Medical Assisting

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- ▶ Gradual increase in scope and complexity of ambulatory care
  - ▶ Hiring and training medical assistants freed nurses to work in hospitals
  - ▶ Medical assistants took on both administrative and clerical tasks
  - ▶ American Association of Medical Assistants (AAMA) was the first professional organization for medical assistants and was formed in 1956

# Educational Programs for Medical Assistants

- ▶ Training programs were established lasting 6 months to 2 years
- ▶ What is accreditation?
  - ▶ Recognition by regional or national organizations for maintaining certain standards.
- ▶ Some programs sought accreditation to achieve high standards
- ▶ Two recognized accrediting agencies
  - ▶ Commission on Accreditation of Allied Health Education Programs (CAAHEP)
  - ▶ Accrediting Bureau of Health Education Schools (ABHES)
- ▶ Certification examination for students of accredited programs
- ▶ Accredited programs must include at least 160 hours of practicum or supervised work experience

# Certification for Medical Assistants

- ▶ Usually not licensed but are encouraged to become certified
  - ▶ Certification is obtained from a national organization whereas licensure is regulated by each state
- ▶ AAMA and American Medical Technologists (AMT) provide certification for medical assistants
  - ▶ National certification examination to become certified
  - ▶ Recertification by continuing education or taking examination again

# American Association of Medical Assistants (AAMA)

- ▶ Administers the Certified Medical Assistant (AAMA) examination
- ▶ Must graduate a program accredited by CAAHEP or ABHES
- ▶ Medical assistant must take and pass the examination
- ▶ May use the initials CMA (AAMA) as a title

# American Medical Technologists (AMT)

- ▶ An organization that offers several certifications
- ▶ Medical assistants may take an examination to be certified as a:
  - ▶ Registered Medical Assistant (RMA)
    - ▶ More rigorous pre-requisites
  - ▶ Certified Medical Administrative Specialist (CMAS)
  - ▶ Registered Phlebotomy Technician (RPT)
- ▶ If the individual meets one of the criteria specified by the AMT, he or she must pass the certification exam of the AMT either at his or her school or online at a testing center.

# Certification for Medical Assistants

- ▶ California Certifying Board for Medical Assistants (CCBMA)
  - ▶ Administers the California Certified Medical Assistant examination
- ▶ National Healthcareer Association (NHA)
- ▶ National Center for Competency Testing (NCCT)

# Obtaining Additional Credentials

- ▶ CPR certification
- ▶ Performing first aid, hearing tests, limited x-ray examinations, or other specialized tests
- ▶ Phlebotomy certification
- ▶ Administrative and/or coding specialist certification
- ▶ In some states, an individual must register as a medical assistant

# Character Traits for Medical Assistants

- ▶ Reliability and dependability
  - ▶ The medical assistant is an integral part of the office practice, so their presence at work is extremely important
- ▶ Organization
  - ▶ There is often a lot going on at once
- ▶ Honesty
  - ▶ Working within one's scope and knowing when to say "I don't know how" keeping the patient's best interest at heart
- ▶ Tolerance
  - ▶ Tolerance allows the medical assistant to work effectively with co-workers and patients from a variety of religious, ethnic, and cultural backgrounds

# Personality Traits of Medical Assistants

- ▶ Interested in people
- ▶ Warm, caring
  - ▶ Able to put the needs of others first
- ▶ Able to remain calm in difficult situations

# Appearance of Medical Assistants

- ▶ Neat, clean, well-groomed
  - ▶ Project professionalism, competence, and confidence
- ▶ Courteous
- ▶ Uniform
  - ▶ Clinical tasks: scrubs
  - ▶ Administrative: scrubs or business casual
- ▶ Scrupulous personal hygiene
- ▶ Short, unpolished nails
- ▶ Only functional jewelry

# Initiative and Behavioral Skills of Medical Assistants

- ▶ Willing to take initiative
  - ▶ Ability to act or follow through without being supervised
  - ▶ Identifying and performing needed tasks without being told to do so
- ▶ Time management
- ▶ Able to adapt to change
- ▶ Able to work with others (team members)

# Time Management

- ▶ Skills and techniques used to accomplish tasks and meet goals in a timely manner
- ▶ Goes beyond day-to-day use of time to include:
  - ▶ Planning and scheduling time to work on specific tasks
  - ▶ Setting goals
    - ▶ Creating and updating a task list that can realistically be accomplished
  - ▶ Prioritizing
  - ▶ Analyzing effectiveness of how time has been used
- ▶ Tools: personal organizers, scheduling software, address books, and accessible reference materials

# Professionalism for Medical Assistants

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## Ethical Responsibilities

- ▶ Should accept responsibility for own actions
- ▶ Should uphold the honor of the profession
- ▶ Should admit mistakes
- ▶ Should know and stay within scope of personal training
- ▶ Should adhere to the AAMA Code of Ethics
  - ▶ Respect patients
  - ▶ Maintain confidentiality
  - ▶ Continue education
  - ▶ Perform community service
- ▶ Can also refer to American Medical Technologists Standards of Practice

# Professionalism for Medical Assistants

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- ▶ Ways of responding to unprofessional behavior of others
  - ▶ If on the same level, discuss calmly with the individual involved
  - ▶ If on a higher level, discuss with the office manager/supervisor
  - ▶ Reports can be made to the state organization that licenses professionals such as physicians or nurses if the behavior poses a danger to patient care

# Professionalism for Physicians

(Slide 1 of 2)

- ▶ Physicians treat patients on the basis of scientific knowledge
- ▶ Physicians can receive professional and ethical guidance from several sources
  - ▶ AAMA code of ethics
  - ▶ State and federal regulations
  - ▶ Regulations of hospital(s) to which physicians admit patients
  - ▶ HMOs or PPOs in which they participate
  - ▶ National medical board of their specialty or subspecialty

# Professionalism for Physicians

(Slide 2 of 2)

- ▶ Medical practice is influenced by the philosophy of the Hippocratic Oath
  - ▶ Key concepts include confidentiality and avoiding harm to patients
  - ▶ Medical knowledge no longer considered secret and restricted only to physicians
  - ▶ The key concept that applies today is “Do no harm.”
- ▶ State and federal laws also define the practice of medicine for physicians
- ▶ Example of unprofessional conduct
  - ▶ Fee splitting: sharing fees with colleagues, especially for making referrals

# Organizations and Publications

- ▶ AAMA and AMT are professional organizations for medical assistants
- ▶ Publications
  - ▶ CMA Today is a publication of the AAMA
  - ▶ Journal of Continuing Education Topics and Issues is a publication of the AMT
  - ▶ State and national professional organizations maintain websites
  - ▶ Conferences are held nationally by the AAMA

# Professional Organizations

(Slide 1 of 3)

- ▶ Peer support
  - ▶ Can be found through local and national meetings
  - ▶ Professional journals facilitate communication

# Professional Organizations

(Slide 2 of 3)

## ▶ Continuing education

- ▶ Why is continuing education important for medical assistants?
  - ▶ The medical field is constantly changing, so it is important for the medical assistant to keep skills up to date, attain new skills, and obtain new information about professional practices.
- ▶ Professional organizations provide continuing education programs to assist in re-certification
- ▶ Continuing education contact hours are called continuing education units (CEUs)
  - ▶ Each certification agency has different requirements in respect to both time and the number of hours, but they all offer online courses and will approve specific courses or programs
    - ▶ CMA (AAMA) must recertify every 5 years with 60 CEUs
      - ▶ 10 in administrative area; 10 in clinical; and 10 in general area; remaining 30 hours in any of three categories
    - ▶ RMA certified after January 2006 must recertify every 3 years with 30 CEUs
    - ▶ NCCT recertify yearly with 14 CEUs and \$77

# Professional Organizations

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- ▶ Legislative advocacy
  - ▶ Professional organizations monitor legislative initiatives that affect the profession of medical assisting
  - ▶ State organizations provide a forum to push for new legislation
- ▶ Conferences
  - ▶ State local, and national meetings are held to help medical assistants meet their professional needs

# Administrative Responsibilities of the Medical Assistant

(Slide 1 of 4)

- ▶ Making appointments
  - ▶ Scheduling office appointments
  - ▶ Scheduling referrals to other specialists and completing paperwork
  - ▶ Scheduling inpatient and outpatient admissions and procedures

# Administrative Responsibilities of the Medical Assistant

(Slide 2 of 4)

- ▶ Filing medical records
  - ▶ Maintaining and filing medical records and reports
  - ▶ Managing information if an electronic medical record is used
  - ▶ Transcribing dictation or printing and filing reports transcribed by an outside service
  - ▶ Creating letters or other documents

# Administrative Responsibilities of the Medical Assistant

(Slide 3 of 4)

- ▶ Performing accounts receivable procedures
  - ▶ Accepting payments
  - ▶ Totaling charges
  - ▶ Recording charges and payments
  - ▶ Billing, insurance, and collection procedures

# Administrative Responsibilities of the Medical Assistant

(Slide 4 of 4)

- ▶ Preparing bank deposits
- ▶ Managing bank accounts
- ▶ Performing accounts payable procedures
  - ▶ Paying bills
- ▶ Keeping records related to payments
- ▶ In PCMH, medical assistant may have additional administrative responsibilities

# Clinical Responsibilities of the Medical Assistant

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- ▶ Collecting and processing specimens
- ▶ Performing diagnostic tests
  - ▶ Cardiac testing (ECG)
  - ▶ Respiratory testing
  - ▶ Other (i.e. CLIA-waved testing like urine POC testing)

# Clinical Responsibilities of the Medical Assistant

(Slide 2 of 4)

- ▶ Preparing patients for examination
  - ▶ Taking medical history and/or chief complaint
  - ▶ Taking measurements
  - ▶ Taking vital signs
- ▶ Preparing examination and treatment room between patient visits

# Clinical Responsibilities of the Medical Assistant

(Slide 3 of 4)

- ▶ Assisting with examinations and procedures
  - ▶ Helping during examinations
  - ▶ Passing instruments and supplies
  - ▶ Removing sutures, bandaging and changing dressings
  - ▶ Preparing for and assisting with minor surgery

# Clinical Responsibilities of the Medical Assistant

(Slide 4 of 4)

- ▶ Performing treatments
  - ▶ Nebulizer treatments
  - ▶ Hot and cold packs or compresses
- ▶ Administer medications and immunizations
- ▶ Administering first aid or assisting with emergency care

# Managing the Medical Office

(Slide 1 of 3)

- ▶ Performing operational activities
  - ▶ Taking inventory of supplies and equipment
  - ▶ Maintaining equipment
  - ▶ Purchasing supplies and equipment
- ▶ Reviewing and/or revising office policies and procedures

# Managing the Medical Office

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- ▶ Performing risk management activities
  - ▶ Promoting health and safety for office personnel
    - ▶ Supervising the infection control plan to prevent the spread of infection
    - ▶ Taking measures to prevent fires
    - ▶ Providing for proper disposal of biohazard waste and controlled substances

# Managing the Medical Office

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- ▶ Maintaining records related to the management of the office
- ▶ Insurance records
  - ▶ Quality control records
  - ▶ Maintenance contracts
  - ▶ Personnel records
  - ▶ Financial/tax records

# Patient Education and Coaching

- ▶ Patient education usually refers to information given to patients both verbally and in writing
  - ▶ Often responsible for educating patient about office policies and procedures
  - ▶ May provide information about maintaining health to patients as directed by physician
  - ▶ May teach a patient about ways to manage his or her disease or condition
- ▶ Health Coaching
  - ▶ A process that helps patients identify their values related to health, set health goals, and take steps to meet their personal goals

# Patient Navigation

- ▶ Patient navigator: Person whose role is to remove the obstacles patients face in accessing and receiving treatment
- ▶ PCMH model attempts to coordinate a patient's care through office of primary care provider
- ▶ The concept was originally developed in relation to the treatment of cancer, which can involve a maze of doctors' offices, hospitals, outpatient centers, and patient-support organizations, as well as numerous problems with insurance and payment systems.

# Employment Opportunities

(Slide 1 of 2)

- ▶ Medical assisting is a fast-growing occupation
- ▶ Locations for employment
  - ▶ Physicians' offices
  - ▶ Hospitals
  - ▶ Other medical practitioners
  - ▶ Schools, laboratories, outpatient care centers

# Employment Opportunities

(Slide 2 of 2)

- ▶ Salaries
  - ▶ Median income in 2016 was \$31,549/year
- ▶ Opportunities for career advancement
  - ▶ May require additional education or training
  - ▶ Office management
  - ▶ Instructor in medical assisting program
  - ▶ Other health career

Questions?