HEARTLAND TECHNICAL EDUCATION CENTER
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Adult Education
Medical Assisting
Introduction to Medical Office
Syllabus
2026 – 2027
96 Hours

Instructor
Jamie Krabill BSN, RN krabillj@heartlandtech.org 419-289-3313 (ext. 2239)
- 19+ years nursing experience
- 13+ years nursing / medical education experience

Supplies
Notebook, pens, pencils, highlighters, etc. provided by student

Course Description:
This course introduces students to the administrative and operational functions of a medical office. Topics include patient reception, appointment scheduling, telephone communication, medical records management, electronic health records, insurance processing, billing procedures, office correspondence, and professional customer service. Students will also learn workplace safety practices, including fire prevention, emergency preparedness, evacuation procedures, and maintaining a safe healthcare environment. Emphasis is placed on professionalism, confidentiality, effective communication, and the efficient operation of medical office systems.

Course Objectives:
Upon successful completion of this course, students will be able to perform essential medical office administrative duties; utilize electronic health records and office management systems; schedule appointments and manage patient flow effectively; demonstrate professional communication skills with patients, providers, and healthcare team members; maintain accurate medical records and protect patient confidentiality; apply basic insurance, billing, and reimbursement procedures; identify workplace hazards and implement safety measures; demonstrate knowledge of fire prevention, fire response procedures, and emergency evacuation protocols; comply with healthcare regulations and office policies; and exhibit professionalism and customer service skills necessary for success in a medical office environment.

Required Text
Today's Medical Assistant, 5th Edition by Kathy Bonewit-West and Sue A. Hunt
Today's Medical Assistant Study Guide, 5th Edition by Kathy Bonewit-West and Sue A. Hunt

Program Policies
Chapter reading and written assignments are to be completed *before* class. Class time will be devoted to discussing content, presenting enrichment materials, answering student questions, taking exams, and additional learning activities.

Student Assessment
Students will be graded on the following weight system
50% Exams
25% Assignments/Quizzes/Projects/Midterms
25% Final Exam

Percent Grade	Letter Grade	Point Value
97 to 100	A+	4.0
93 – 96	A	4.0
90 – 92	A-	3.7
87 – 89	B+	3.3
83 – 86	B	3.0
80 – 82	B-	2.7
77 – 79	C+	2.3
73 – 76	C	2.0
70 – 72	C-	1.7
67 – 69	D+	1.3
63 – 66	D	1.0
60 – 62	D-	0.7
0 - 59	F	0

Course Schedule/Outline/Calendar of Events (subject to change)

Date and Material Covered	Content Objectives	Related Learning Experiences & Assessments
Week of April 5, 2027 Chapter 36: Emergency Preparedness and Protective Practices	● State the effects of a disaster or serious emergency can have on a health care facility ● Explain the difference between a natural disaster and a man-mad disaster and list examples of each ● List the characteristics of a disaster that tend to cause the most serious psychological effects ● List and describe the three phases of the generalized adaption syndrome ● List and describe the stages of anxiety and the intervention that should be employed for each ● State the purpose of an emergency action plan ● List and describe the six elements that must be included in an emergency action plan ● Identify the information that should be included on an evacuation floor plan ● State the duties that may be performed by evacuation wardens in the medical office ● List and describe the elements of a fire ● State the five elements that must be included in a fire prevention plan ● Identify methods of fire prevention in the medical office ● List and describe safety measures used for fire protection in the medical office ● List and describe the five classes of fire ● List and describe the steps included in the PASS acronym for working a fire extinguisher ● Identify the steps included in the RACE response ● Identify the education and training that must be provided to medical assistants related to medical office emergency situations ● State the purpose of emergency practice drills ● Describe the role of the medical assistant in disasters and serious emergencies	Read ● Ch 36 Assignment ● Ch 36 Assessment ● Ch 36 Exam Procedures ● Develop and emergency action plan for a natural or man-made disaster ● Demonstrate methods of fire prevention in the health care setting ● Demonstrate proper use of a fire extinguisher ● Participate in a mock exposure event, and document the steps taken
Date and Material Covered	**Content Objectives**	**Related Learning Experiences & Assessments**
Week of April 12, 2027 Chapter 38: The Medical Record Chapter 39: Patient Reception	● Explain the difference between a paper-based medical record and an electronic health record (EHR) ● List the general functions of EHR software ● Describe the organization of a source-oriented medical record and a problem-oriented medical record ● List and define the four subcategories included in the progress notes of a problem-oriented record (POR) ● Describe the usual format of and EHR ● List the categories of information obtained on the new patient information form ● Describe the function of the Notice of Privacy Practices ● Identify the information obtained in each of the following consent documents:	Read ● Ch 38 ● Ch 39 Assignment ● Ch 38 ● Ch 39 Assessment ● Ch 38 Exam

	procedure consent and release of medical information ● Give examples of correspondence and telephone messages often found in the medical record ● List and describe the components of the medical record database ● Describe how the problem list is coordinated with billing the EHR ● Explain the necessity to finalize progress notes in the EHR ● Compare storage of laboratory reports, diagnostic tests, and reports of diagnostic tests in the paper-based medical record and the EHR ● List and describe other clinical reports that may be found in a medical record ● List and describe the seven sections of the health history ● List the guidelines that should be followed in recording the chief compliant ● List and describe the guidelines to follow to ensure accurate and concise documentation ● List and describe the types of progress notes that may be documented by the medical assistant ● List examples of subjective symptoms and objective symptoms ● List and describe common symptoms ● Describe how to open the medical office and prepare for the day's activities ● Compare and contrast the tasks necessary to open and close the medical office ● Discuss measures to protect the confidentiality of patients in the reception areas ● List information that must be obtained from new patients ● Describe the proper procedure ot check in a new or established patient ● Discuss procedures that are necessary to validate that patient's insurance will pay the bill ● List information that must be given to a new patient about the practice ● Describe different types of informational materials for new and prospective patients	● Ch 39 Exam Procedures ● Complete a procedure consent form ● Complete a release of medical information form ● Obtain a patient history and formulate a chief complaint ● Open the medical office ● Close the medical office ● Obtain new patient information ● Explain office policies and procedures

Date and Material Covered	Content Objectives	Related Learning Experiences & Assessments
<u>Week of April 19, 2027</u> Chapter 41: Telephone Techniques Chapter 42: Scheduling Appointments Chapter 43: Medical Record Management	● Describe the importance of effective telephone courtesy and a pleasing telephone personality for the medical assistant ● Explain the use of multiline telephones, cell phones, smart phones, and pagers in the medical office ● Differentiate between incoming telephone calls the medical assistant can handle and other incoming calls ● Describe the correct procedure for screening incoming calls ● Describe the correct procedure for taking messages and transcribing messages recorded on an answering machine or voicemail ● Identify the correct steps to respond to a telephone call regarding an emergency ● Describe how to deal with problem calls ● Explain how the medical assistant should make outgoing telephone calls ● Describe how scheduling appointments efficiently meets the needs of both providers and patients	Read ● Ch 41 ● Ch 42 ● Ch 43 Assignment ● Ch 41 ● Ch 42 ● Ch 43 Assessment ● Ch 41 Exam ● Ch 42 Exam

	• Compare and contrast manual and computer scheduling systems • Explain why the medical office must retain an official record of patients seen each day (daily appointment schedule) • Describe several types of scheduling, including stream scheduling, wave scheduling, modified wave scheduling, double booking, open booking, and patient self-scheduling • Identify types of patient appointments that may be clustered in the appointment schedule • Identify factors to be considered when setting up the appointment schedule • Explain how to set up the appointment schedule • Differentiate between the information needed to make an appointment for a new patient and for an established patient • Differentiate amount medical conditions that require emergency care, urgent care, and routine care • Describe how to schedule appointments for individuals who are not patients • Describe the method for changing or canceling appointments • Describe how to document changes to the appointment schedule and cancelations or no-shows in the medical record • Identify three methods to remind patients to make or keep appointments • Discuss the storage of appointment schedules and/or daily schedules • Identify how to schedule inpatient and outpatient diagnostic tests and procedures • Identify how to schedule hospital admissions and surgery • Describe how an electronic health record (EHR) system saves time, once it is set up and staff have been trained • Discuss methods to maintain the integrity of the EHR • Discuss the methods for storage of EHR • Identify supplies and equipment needed to create and store paper-based medical records • Describe how to create a new paper-based medical record • Describe different types of filing systems • List principles of alphabetic and numeric filing • Describe the process of filing reports and paper-based medical records • Compare and contrast advantages and disadvantages of alphabetic and numeric filing systems for paper-based medical records • Identify methods for retention and disposition of paper-based medical records	• Ch 43 Exam Procedures • Perform telephone screening • Take a telephone message • Take patient requests for medication or prescription refills • Telephone a patient for follow-up • Set up an appointment schedule • Make an appointment • Manage the appointment schedule • Schedule inpatient and outpatient diagnostic tests or procedures • Schedule inpatient or outpatient admissions • Prepare a medical record • File patient records using the alphabetic method and numeric method • File reports
Date and Material Covered	**Content Objectives**	**Related Learning Experiences & Assessments**
<u>Week of April 26, 2027</u> Chapter 44: Written Communications and Mail Chapter 45: Managing Practice Finances	• Define the parts of a business letter • Identify different formats for preparing business letters • Explain how to format and compose a business letter • Identify how to respond to written communication from businesses and patients • Identify postal addressing standards for envelopes and mailing labels • Describe the process of creating memoranda • Discuss the importance of using correct grammar, spelling, and punctuation in written communication • Explain how to prepare and proofread documents • Compare the use and style of business letters and electronic communication,	Read • Ch 44 • Ch 45 Assignment • Ch 44 • Ch 45 Assessment

	such as e-mail or secure messaging within the EHR ● Explain how to use e-mail and attachments for business communication ● Explain how to transmit information using a fax machine ● Identify the function of the U.S. Postal Service (USPS) ● State the purpose of the ZIP and ZIP +4 systems ● Describe the use of the following USPS mail classifications: priority mail express, first-class mail, priority mail, USPS retail ground, and media mail ● Correlate available insurance and delivery confirmation services with their appropriate use in the medical office ● List and describe the steps for processing incoming mail ● Describe how to prepare labels and envelopes for mailing ● Compare and contrast postage meters and online postage services ● Describe how computerized methods of maintaining patient accounts are based on former manual systems ● Identify the information contained in a fee schedule and describe how it is used ● Describe the information contained in a patient account ledger ● List the steps to post charges, payments, and/or adjustments to the patient account ● Describe the process to print patient ledgers, day sheets, or other reports using a practice management computer system ● Differentiate between accounts receivable and accounts payable ● Describe how to inform patients about financial obligations for services received ● Identify various types of bank accounts ● Describe precautions to take when accepting cash, checks, credit cards, or debit cards ● Discuss methods to transfer funds electronically ● Describe how to balance a cash drawer ● Describe how a bank deposit is prepared and made ● Describe how entries are made in the cash disbursement journal ● Describe how to maintain a petty cash fund	● Ch 44 Exam ● Ch 45 Exam Procedures ● Compose a business letter ● Process incoming mail ● Prepare envelopes for mailing ● Post charges to the patient ledger ● Post payments and/or adjustments ● Demonstrate professionalism and sensitivity when requesting payment for services rendered ● Prepare a bank deposit
Date and Material Covered	**Content Objectives**	**Related Learning Experiences & Assessments**
<u>Week of May 3, 2027</u> Chapter 46: Medical Coding Chapter 47: Medical Insurance	● Describe the history and rationale for using coding systems in medical care ● Describe the levels of Healthcare Common Procedure Coding System (HCPCS) codes ● Describe the type of codes included in each section of the Current Procedural Terminology (CPT) manual (Level I HCPCS codes) ● Describe how to locate an accurate CPT code ● Identify when HCPCS Level II codes should be used ● Describe how to locate an accurate HCPCS Level II code ● Perform procedural coding ● Describe the format and use of International Classification of Diseases, 10th Revision, Clinical Modification (ICD-10-CM) codes ● Describe how to select an accurate code with the correct level of detail using ICD-10-CM codes ● Perform diagnostic coding ● Explain how procedure and diagnosis coding are used by third-party payors to	Read ● Ch 46 ● Ch 47 Assignment ● Ch 46 ● Ch 47 Assessment ● Ch 46 Exam ● Ch 47 Exam Procedures ● Perform CPT coding

	validate medical necessity ● Give examples and explain the effects of upcoding and down coding ● Trace the history of health insurance in the United States ● Identify and describe three ways in which to obtain health insurance ● Explain the regulations that control the amount of health insurance reimbursement for an individual claim ● Compare and contrast traditional fee-for-service health insurance plans with managed care insurance plans ● Identify and define various types of managed care plans ● Describe eligibility and benefits for the Medicare plan ● Explain the general provisions of the Medicaid plan and the state children's insurance program ● Describe government programs available to dependents of the armed services and veterans ● Explain when workers' compensation covers medical care and compare it with other insurance plans ● Describe how to collect information from patients for insurance billing ● Describe the process for verifying eligibility and covered services ● Correlate preauthorization and precertification requirements to the utilization review process ● Describe the referral process for managed care ● Identify the information contained on an insurance form ● Recognize potential errors in a completed insurance form ● Describe the process for submission and payment of a health insurance claim following insurance guidelines ● Categorize common errors that result in denied insurance claims ● Demonstrate professional and tactful communication skills with third-party representatives, medical providers, and patients	● Perform HCPCS coding ● Perform ICD coding ● Demonstrate tact when discussing code selection and coding requirements with providers ● Interpret the information on an insurance card ● Verify insurance eligibility ● Obtain insurance preauthorization (precertification) ● Complete and review the insurance claim form ● Communicate professionally and with sensitivity on matters related to managed care and/or insurance
Date and Material Covered	**Content Objectives**	**Related Learning Experiences & Assessments**
<u>Week of May 10, 2027</u> Chapter 48: Billing and Collections Chapter 49: The Medical Assistant as Office Manager Chapter 50: Obtaining Employment	● Describe the process of billing and collections ● Describe problems that can occur when patients pay by check ● Explain how to adjust patient accounts for an overpayment and process a refund ● Develop a collection system ● Identify past due accounts and the actions needed ● Describe the information to include in a collection letter ● Identify legal requirements that affect collections for the medical office ● Describe special circumstances affecting collections in the medical office ● Describe routine maintenance activities in the medical office ● Describe an efficient system of maintaining equipment inventory lists and operator manuals ● Maintain administrative and clinical equipment ● Describe the process of obtaining new equipment ● Explain procedures for taking inventory ● Describe an effective method for ordering, receiving, and storing supplies ● Identify methods to maintain a safe environment and prevent injury to patients and employees	Read ● Ch 48 ● Ch 49 ● Ch 50 Assignment ● Ch 48 ● Ch 49 ● Ch 50 Assessment ● Ch 48 Exam ● Ch 49 Exam Procedures ● Process patient statements

	● Explain how safety signs, instructions, and labels contribute to a safe office environment ● Explain employer obligations related to payroll ● Describe ways to enhance teamwork in the medical office ● Describe the medical assistant's role in orienting and training new employees ● Manage the provider's professional schedule ● Locate community resources to assist patients and medical office staff ● List types of liability, professional (malpractice), and personal injury insurance for providers, the medical office, and medical assistants ● Describe the process of compliance reporting for unsafe activities, errors in patient care, and conflicts of interest ● Describe how incident reports should be used to protect the medical office ● Describe the process for locating potential employers when looking for a job ● Discuss the steps in preparing a resume ● Describe how to write a cover letter ● Differentiate between information placed on a resume and information required on an employment application ● Explain how to provide potential employers with a resume by mail, using a fax, or using internet instructions ● Prepare to answer questions commonly asked in a job interview ● Describe measures to prevent job burnout ● Identify two professional organizations to which a medical assistant may belong ● Identify benefits of joining a professional organization ● Discuss why lifelong learning is vital for a medical assistant after graduation	● Post a "non-sufficient funds" check ● Process a credit balance and refund ● Create and examine an accounts receivable aging record ● Write a collection letter ● Perform routine maintenance of equipment ● Take a supply or equipment inventory ● Create an environmental checklist and perform a safety inspection ● Comply with safety signs, symbols, and labels ● Locate and facilitate referrals to community resources ● Complete an incident report ● Take part in a mock interview process ● Compose a resume and cover letter

All dates are subject to change

Revised 8/2026