



## MEDICAL OFFICE

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Medical office youth apprentices perform a variety of administrative tasks in a medical office or patient scheduling centers.

**Length of Apprenticeship:** One year

## COMPETENCIES

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Medical Office youth apprentices must complete **a total of 10** competencies. **Nine** of the competencies must be from the list below. If necessary, employers can substitute **1** competency with another occupationally appropriate skill. That skill should be added to the competency list for assessment.

### Required Competencies

1. Locate information in the client record
2. Create and/or maintain a client record
3. Navigate the medical record and/or client scheduling software
4. Manage client appointments
5. Answer phones
6. Perform basic payment collection
7. Use common office software applications
8. Order and receive supplies and/or equipment
9. Perform an inventory of supplies and/or equipment
10. Demonstrate customer service skills

## REGISTERED APPRENTICESHIP BRIDGING OPPORTUNITIES

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Some of the related instruction courses can bridge into the following registered apprenticeships:

- Medical Assistant registered apprenticeship
- Community Health Worker registered apprenticeship

## POST-SECONDARY PATHWAYS

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There are several post-secondary pathway opportunities in this area. Following is partial list:

- Medical Assistant
- Medical Administrative Professional
- Health Information Technology



# Medical Office

## Youth Apprenticeship ON-THE-JOB LEARNING PERFORMANCE STANDARDS GUIDE

### YOUTH APPRENTICE INFORMATION

<b>Youth Apprentice Name</b>	
<b>YA Coordinator</b>	<b>YA Consortium</b>
<b>School District</b>	<b>High School Graduation Date</b>

### REQUIREMENTS

Youth apprentices must complete ALL the items listed below. Check completed areas.

- Competency checklist
- Employability Skills checklist (in the On-the-Job Learning Performance Standards Guide) or the DPI Employability Skills Certificate
- Related instruction equal to 1 high school credit or at least 3 college credits
- Minimum of 450 work hours

### HOURS

Record the hours the youth apprentice worked.

<b>Total Hours Employed</b>	<b>Company Name</b>	<b>Telephone Number</b>

## REQUIRED COMPETENCIES

Youth apprentices must perform a **total of 10 competencies**. **Nine** of the competencies must come from the list below. If necessary, employers can substitute **1** competency with another occupationally appropriate skill. That skill should be added to the bottom of the list for assessment.

### Rating Scale

3: Exceeds entry level criteria | Requires minimal supervision | Consistently displays this behavior

2: Meets entry level criteria | Requires some supervision | Often displays this behavior

1: Needs improvement | Requires much assistance and supervision | Rarely displays behavior

Competency and Rating Criteria	Minimum Rating of 2 for EACH Check Rating		
	1	2	3
<b>1. Locate information in the client record</b> <ul style="list-style-type: none"> <li>access appropriate client record</li> <li>navigate the client record to locate information</li> <li>assemble information as requested</li> <li>maintain confidentiality of client information</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2. Create and/or maintain a client record</b> <ul style="list-style-type: none"> <li>ensure client privacy and comply with HIPAA requirements</li> <li>verify the patient's current address, phone number and allergy information</li> <li>ensure client identification appears on each record or form used</li> <li>confirm accuracy of information</li> <li>copy or scan insurance cards or other documents as required</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>3. Navigate the medical record and/or client scheduling software</b> <ul style="list-style-type: none"> <li>open the record</li> <li>accurately schedule appointments or check in clients</li> <li>accurately utilize medical terminology in scheduling medical appointments</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>4. Manage client appointments</b> <ul style="list-style-type: none"> <li>greet client</li> <li>display sensitivity to client information</li> <li>refer client for priority scheduling or urgent care</li> <li>identify the time required for the health service</li> <li>enter appointment and other required information</li> <li>document scheduling changes in the correct locations</li> <li>manage appointment reminders</li> <li>enter appointment results: late, no show, rescheduled, cancelled, etc.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Competency and Rating Criteria	Minimum Rating of 2 for EACH Check Rating		
	1	2	3
<b>5. Answer phones</b> <ul style="list-style-type: none"> <li>• answer promptly with an appropriate greeting</li> <li>• triage calls as appropriate</li> <li>• transfer call to appropriate individual when necessary minimizing time on hold</li> <li>• respond discretely to the caller</li> <li>• do not provide confidential information without appropriate authorization</li> <li>• take messages correctly documenting information</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>6. Perform basic payment collection</b> <ul style="list-style-type: none"> <li>• verify insurance coverage, deductibles, and co-payments using electronic systems or other means</li> <li>• document disbursements or deposits to the cash drawer in the appropriate record</li> <li>• operate cash register and make accurate change if applicable</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>7. Use common office software applications</b> <ul style="list-style-type: none"> <li>• utilize basic features of office software</li> <li>• manage files within an application</li> <li>• perform common editing and formatting functions</li> <li>• perform common printing functions</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>8. Order and receive supplies and/or equipment</b> <ul style="list-style-type: none"> <li>• place orders for supplies, equipment, and/or medications</li> <li>• verify the receipt of a shipment</li> <li>• identify supply items and/or medications requiring special handling or storage</li> <li>• store and stock items appropriately</li> <li>• update inventory record</li> <li>• file or route warranty and service agreements as appropriate</li> <li>• file or route the Packing Slip and/or any Material Data Sheets (MDS) received to the appropriate places</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>9. Perform an inventory of supplies and/or equipment</b> <ul style="list-style-type: none"> <li>• complete inventory of supplies, equipment, and/or medications</li> <li>• document inventory</li> <li>• communicate changes in availability to worksite professional</li> <li>• assist with removal and disposal of expired, damaged, and/or recalled items as required</li> <li>• straighten and clean shelves</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Competency and Rating Criteria	Minimum Rating of 2 for EACH Check Rating		
	1	2	3
<b>10. Demonstrate customer service skills</b> <ul style="list-style-type: none"> <li>• focus on effective customer communication</li> <li>• determine responsive methods to identify and meet customer needs</li> <li>• determine effective customer follow-up procedures</li> <li>• meet the needs of the diverse customer</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Substitute Competency (if you replaced a competency above, note the competency and rating)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Comments:</b>			

**RELATED INSTRUCTION**

Indicate which related instruction courses the youth apprentice completed:

Course Title	Credits	Location