



### Step 1 Learning Objectives for Lesson 2

- ❑ When you complete the instruction in this lesson, you will be trained to do the following:
  - Describe the administrative equipment used in a medical front office.
  - Explain front-desk responsibilities.
  - Discuss the fundamental components of effective phone skills.
  - Illustrate how to schedule appointments.
  - Determine the pros and cons of the various scheduling methods.
  - Describe the process to resolve canceled appointments, walk-ins and special office situations.
  - Explain how to handle mail in the medical office.
  - Describe time- and task-management techniques in the medical office.



### Step 2 Lesson Preview

- ❑ In Lesson 1, you met several healthcare office managers. You followed each one through his or her typical day in a medical office. You learned about the various tasks they complete throughout the day. Now that you have that general overview, let's take a more in-depth look at the healthcare office manager's duties in the front office.

We'll begin with a review of the equipment you'll find in the medical front office. You'll then study reception duties. You'll examine the fundamentals of effective phone skills and explore how to handle special situations, such as angry patients, salespeople and children.

Then, we'll move on to appointments. As a healthcare office manager, you'll spend much of your time dealing with patients' appointments—making them, canceling them and rescheduling them. You'll also discover how to receive patients with and without appointments.

The next section of the lesson focuses on how to handle mail in the office. You'll examine the different classes of mail and how to handle ingoing and outgoing mail and office e-mail. Finally, we'll introduce you to general office management duties and techniques.

Are you ready? Let's get started!



## Step 3 Administrative Equipment

- You probably have a general idea of what kinds of office equipment the medical office uses. In Lesson 1, we briefly discussed the equipment you'll use as a healthcare office manager. Let's review the tools you'll use in your work in more detail.

### Basic Equipment

Basic equipment is just that: basic. You probably already know how to use most of these items. You may even use them in your everyday life! Calculators, copiers, fax machines and telephones with answering systems have become so integral to our daily lives that we often consider them necessities. You may know someone who checks his messages and e-mail the instant he walks in the house. Only a few decades ago, the first facsimile, or fax machine, was put into commercial use. With the advent of fax machines, transmission of data suddenly became instantaneous, and the possibility of a global economy was born. Now fax machines are so run-of-the-mill that many people have them in their homes. Technology has become an important tool in our lives. Let's take a look at some of the amazing inventions that we now consider commonplace.

- **Calculator**—Healthcare office managers need to know how to use a calculator to manage a number of different tasks in the medical office. A simple **calculator** (a mechanical device that performs various mathematical calculations) with 10 number keys that can perform basic mathematical equations is sufficient for the medical office.
- **Copy Machine**—Administrative staff uses the copier to make copies of insurance cards, encounter forms and other records. As a healthcare office manager, it's important that you remember to photocopy patients' insurance cards when they come in for a visit. You need to learn to load the paper, clear paper jams, change the toner and clean the copy machine in your medical office. Certain rules and regulations govern the use of copy machines. Any copyrighted materials require that you get permission before you make a duplicate. Make sure that you copy materials legally. And, of course, your code of work ethics would prevent you from using the copy machine for personal reasons without your employer's consent.
- **Fax Machine**—You'll use a fax machine to send copies of forms and records to other providers, hospitals or insurance companies. The same copyright regulations apply to the fax machine, so make sure to follow the law. The sensitive nature of some documents requires confidential faxing procedures. It's very important that faxes aren't sent to people who are not authorized to view the information. Make sure you know what you fax and who will receive it.



Healthcare office managers use a copy machine to duplicate important records and forms.



- **Telephone-answering System**—You use the phone system to store frequently called numbers, direct calls to appropriate personnel, arrange conference calls and use multiple lines to answer more calls at once. Some functions also allow you to schedule appointments on a daily calendar. Then, the phone can alert you when important meetings are coming up.
- **Answering Machines and Voicemail**—Most medical offices now use voicemail rather than answering machines. The advanced options of voicemail allow the medical office to answer its telephones 24 hours a day, and it saves staff time as it selects the correct call recipient without the help of a receptionist.

## Specialized Equipment

Now, it's time to learn more about some of the devices that you may not be as familiar with. *Medical transcribers*, *microfilers* and *dictation machines* all assist in gathering and storing patient information. Doctors use dictation machines to make records of their notes and instructions. Medical transcribers, which you briefly learned about in Lesson 1, provide hard copies of doctors' notes for medical records, and microfilers convert large quantities of records into a small space. When used together, the transcriber, microfiche and dictation machine can minimize the area needed for records storage and ensure the accuracy of the information itself.

- **Medical Transcriber**—A **medical transcriber** allows you to listen to a voice recording while you type what you hear into a computer. Most medical offices use a word-processing program for their transcription requirements. The doctor records her patient exam notes over the phone. The transcription then accesses the audio file that links to her transcription software.
- **Microfilm**—A **microfilmer**, **imager**, or **microfiche**, is a machine used to reduce a document to a very tiny size and store it as a film image, either on a roll or on a microfiche. The document then becomes too small to actually read without magnification. When the information is needed, a microfilm reader/printer magnifies the image to normal size on a screen. The machine can also print a copy of the document in its original format. Keep in mind that this technology is dated and you will no longer use it to store new information. However, you may need to look up old patient information on a microfilmer.
- **Digital dictation service**—In years past, medical staff used a **dictation machine** to voice record notes. Usually, they used a hand-held, portable tape recorder, and they would pass their tapes on to the medical transcriptionist. These days, most physician's offices use a digital transcription service. The physician calls a phone line and dictates his notes. These notes then link to a computer network and the medical transcriptionist can access the audio file from her computer.



After the medical transcriptionist transcribes the doctor's notes, the computer stores the information in an electronic medical file.



## Step 4 Reception

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- The front desk of a medical office is often busy. Healthcare office managers greet patients, answer phones, field patient questions and assist the physician and other office staff. Physicians rely on the healthcare office manager. Let's examine some of the front-office duties in a medical office.

### Open and Close the Office

As a healthcare office manager, you may open and close the office. Offices usually have specific procedures for opening and closing, which are written in a *policy and procedures manual* along with other office policies. Take a look at the following sample list of duties to open and close the office.

#### Open the Office

To open the office, you may perform some or all of the following tasks:

- Unlock doors.
- Check messages from the night before.
- Check e-mail messages.
- Check for lab results.
- Turn on computers and other machines.
- Double-check that all health records were pulled for the day's patients.
- Check the fax machine.

#### Close the Office

To close the office, you may perform these tasks:

- Ensure that the day's mail is read to go.
- Shut down computers and other machines.
- File health records and other paperwork from the day.
- Print a list of appointments and reminders for your boss for the next day.
- Count payments for the day, and prepare a bank deposit.
- Lock doors.



There's more to closing a medical office than just locking the doors.



## **Interact with Patients**

As a healthcare office manager, you'll constantly interact with patients, whether it's in person, on the phone or via e-mail. Let's explore some skills to effectively interact with patients.

### **Greet Patients**

When patients open the door to your medical office, you'll likely be the first person they see. Often, patients check in for the appointment at the front desk and receive paperwork to complete. Patients might need to provide insurance information, update their personal information or complete new patient questionnaires. Remember to photocopy patients' insurance cards for your files. In any event, you will help patients with their paperwork, gather forms they need to fill out and answer any questions they have.

Remember, you essentially represent your medical office, and your level of professionalism reflects the quality of your medical office. Some people feel anxious about visiting the doctor, so welcome the patients, help them feel comfortable and assist them with their questions.

In addition, since a medical office is a business, it will also receive visitors. Other visitors could include physicians, pharmaceutical representatives, medical sales representatives, former patients, relatives of patients and employees' family members. You should politely greet each of these visitors.

As you greet patients, you may face several special situations. Let's discuss how to handle each.

### **Handle Special Situations**

Healthcare office managers must demonstrate another important quality in addition to those we discussed in Lesson 1. They must genuinely like people. Most people you meet in your job will be pleasant. However, a few may present difficult or challenging situations. Use your intuition, professionalism and respect for people to choose the right solution when problems arise. Let's examine some common situations that healthcare office managers encounter.

#### ***International Patients***

The United States has been called the "great melting pot." People of all cultures and races live in communities small and large. Many speak a different language or talk with a heavy accent. Even the smallest medical clinic will sometimes encounter a patient from another country who may not speak English. Find out what language skills the office employees have. Several may be bilingual and can translate should the need arise. Simple patience and tolerance, as well as speaking slowly and clearly, will help in these situations. Also, watch nonverbal cues from patients, such as facial expression, nodding, shrugging, etc.

#### ***Disabled Patients***

You may encounter patients who have slight hearing or visual impairments, or who are deaf, blind or wheelchair-bound. Treat everyone naturally, without making a fuss. Indicate where a disabled person might comfortably sit, or move a chair so there is room for a patient who uses a wheelchair.



Quiet children help maintain a professional office environment.

## Children

You will likely work with children in your new career. Many children may become bored after being cooped up in an office. You can distract a child who is rowdy, nervous, tired or bored if you have a few children's books or magazines (in various reading levels), some crayons and scrap paper and some simple toys on hand. You can bet that everyone—the children, their parents, your coworkers and other patients—will appreciate it.

## Unsolicited Salespeople

Some sales representatives will be welcome at your office. Salespeople, such as pharmaceutical representatives—provide information about current products, services, prices, delivery schedules and technical data to your office. Find out your medical facility's policy on salespeople.

Sometimes, you may have to turn away a salesperson whose products are not needed or wanted. Some salespeople can be pushy and insistent. Remember, this is their livelihood. But calmly repeat your apology until the person tires of your answer and leaves. Sometimes, it helps to recommend a more appropriate place or organization that the salesperson might try.

## Angry or Rude Patients

The most difficult situation you may face as a healthcare office manager is an angry patient. When you encounter an angry patient, remain professional to calm him or her. There may be a good reason for the person's behavior. In any case, your ultimate goal is to turn an uncooperative patient into a cooperative one.

Do not blame the patient for the problem or situation. This only adds to the tension. Follow these tips to deal with difficult patients:

- Remain calm. Your anger or frustration will only stoke the flames of an upset patient's fire.
- Find a place to discuss the dilemma.
- Let the patient know you want to help. Ask questions to solve the problem.
- Listen carefully to what the person says, and clarify any points you don't understand. Listen to the entire story when possible.



Remember to keep your cool when you deal with hotheads.



- Don't criticize or act defensive. Remember, the person is probably not upset with you.
- In the rare instance that a patient seems highly aggressive, intoxicated or abusive, call security or a coworker to help and to act as a witness.

Keep these strategies in mind as you deal with different patients in your new career.

Next, let's look at another important responsibility of the front desk, answering the phone.



## Step 5 Effective Phone Skills

- We can't mention the front desk without mentioning the telephone. You'll learn telephone professionalism in the supplement, *Develop a Professional Medical Phone Personality*, but we'll briefly discuss the importance of your telephone skills. In today's extremely competitive workplace environment, every contact with patients and coworkers needs to be a positive one—every first impression a favorable one.

When you answer the phone, you represent your medical office, and your professionalism reflects the quality of your organization. This is a huge responsibility. After all, a caller may easily detect irritation or an insincere desire to help. You should answer calls quickly, or the patient may take her business elsewhere.

The two fundamentals of effective phone skills include warm confidence and genuine concern. Used together, these traits will help you:

- Deal with the patient-service challenges effectively.
- Handle difficult callers with self-assurance.
- Reduce stress and maintain composure, even during a chaotic day.
- Improve marketing skills.
- Make a favorable impression on patients and coworkers.
- Create a sense of trust and preference for your organization in patients.

Another tip is to always answer the phone with a smile on your face. This helps you to answer with a friendly tone in your voice. Believe it or not, callers can "hear" whether you are smiling or not!

Let's face it. We've all tried calling organizations only to be frustrated by endless rings, being placed on hold seemingly forever, confusing voicemail systems and rude receptionists with few answers and little help. You don't want your callers to feel frustrated, so when the phone rings, treat the caller as you wish to be treated.

As you can see, phone skills are an essential part of your job as a healthcare office manager. Now, let's look at another important task—scheduling.



## Step 6 Schedule Appointments

- ❑ As a healthcare office manager, you'll spend quite a bit of time scheduling **appointments**, or prescheduled meetings, for many patients. Appointments are the most common method used to manage time in the medical world. They keep work flowing and give people the opportunity to meet, discuss, interview, review, sell and teach. You will make, change and cancel appointments that patients, healthcare professionals or salespeople request with your organization, or that your supervisors request with others.

There's more to scheduling appointments than you might think. For instance, the doctors you work for might have different schedules. One doctor prefers to have her mornings open, so you must schedule all of her appointments in the afternoon. The other doctor prefers to have his appointments in the morning so he can meet with associates and pharmaceutical salespeople in the afternoon.

As a healthcare office manager, you need to use good judgment when you schedule appointments. Consider the following three items:

1. Your boss's preferences. Does he want Mondays and Fridays free of appointments? Will he or she see patients between noon and 2 p.m.?
2. Which appointment takes priority? How should you handle emergencies and urgent issues?
3. How much time does each appointment take, and how many minutes should you schedule between appointments? Do appointment times vary depending on the reason for the visit?



Proper scheduling utilizes your multitasking skills.

### Gather Information

To schedule appointments, you must gather accurate information. Make sure you get the following details before you hang up the phone or let that person leave the office.

- **Name and date of birth**—Make sure you write the person's complete name, correctly spelled and as the patient wants it written. Write the pronunciation next to the entry if this will help you or your supervisor later. Also enter the patient's date of birth.
- **Telephone number**—Record the area code and the phone number of a daytime telephone for each patient. The number will save you time and effort when you need to cancel or rearrange appointments. If necessary, record a pager, extension number or cell phone number.





- **Reason for Appointment**—Some offices write the reason out completely, while others use code numbers or letters for this purpose; still others use specific phrases.
- **Insurance Information**—Gather the patient’s insurance information, including the insurance company name and the coverage type. If the patient is in the office, ensure you have an updated photocopy of her insurance card.
- **Referral Source**—It’s important to know how a patient was referred to a healthcare organization. Your office can study this information to see what kind of advertising works. Some medical professionals like to know who referred a patient, so they might mention it in the first appointment. (“I understand that a patient referred you.”) Many physicians send a thank-you note to each patient or medical professional who refers a new patient.

### Record Information

When you record an appointment, offer the patient a choice of days and times, when possible. Then, enter the information into the computer or neatly in pencil if your office uses a paper-based appointment system—you may need to erase it later. Remember to include the patient’s phone number or other time-saving information. Before you go home each day, print a list of appointments and reminders for your boss for the next day.

If a patient cancels or changes an appointment, erase the old entry. If a patient is a no-show, note this in the appointment system.

Some medical offices allow for a certain amount of time in the morning and afternoon for emergency or urgent appointments; these are known as **buffer periods**.



Include time-saving information when you record a patient’s appointment.

### Create a Schedule of Appointments for a Doctor

When you make a schedule of appointments for a doctor or supervisor, follow these general instructions:

- Understand your supervisor’s preferences, such as when and how to make appointments and what type of reminder she prefers. You might ask, “How would you like me to remind the pharmaceutical salespeople of the meetings we’ve scheduled?”
- Place a copy of the day’s schedule on the doctor’s desk or other designated location. Ask your supervisor to review the day’s calendar for accuracy.
- Enter appointments into the computer or calendar clearly.
- Avoid scheduling appointments too early or too late, based on office protocol—before 9 a.m. or after 4 p.m., for example.



- Schedule appointments in blocks, if you can, instead of scattered throughout the day.
- Keep the doctor's appointment schedule lighter than usual a few days before and a few days after a business trip or vacation.
- Allow enough time for appointments—consider travel time when meetings are out of the office.
- Unless it's a lunch meeting, avoid scheduling appointments during the lunch hour.
- Don't make an appointment if you suspect the doctor doesn't want to meet with this person. You can say, "I'm only making appointments at Dr. Solvang's request for the next week. Please let me call you back after I speak with him."
- Record future appointments and events on the appropriate calendars or in the computer as soon as they are made.
- Place a reminder of critical due dates and anniversaries or birthdays on your calendar one week early.
- Record any necessary or new information on the calendar or in the computer along with the appointment.
- Keep your appointment books, computer files and calendars (for use as a tax history) for at least one full fiscal year (the office's 12-month financial reporting period), depending on the doctor's needs.
- When you start a new calendar, record recurring events first, such as due dates or annual medical conventions.

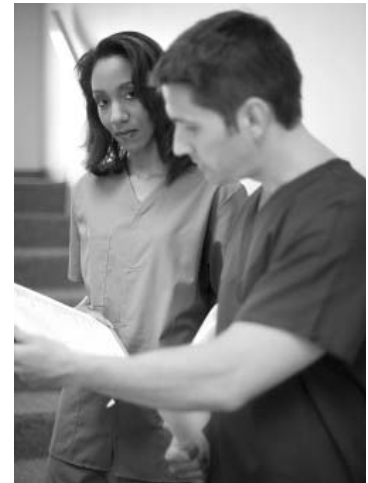
Now that you have some general information about how to set appointments, let's look at the different types of appointment systems.



## Types of Appointment Systems

There are many different systems used to make appointments. The success of a system depends on how it fits with your office environment. For example, scheduled appointment systems work well for medical offices. Patients come into the office at a certain time for an appointment. This way, they have time to see the medical professional.

The success of an appointment system also depends on how well the healthcare office manager uses it. If she doesn't keep the system current, it won't work well as a time-management tool. For example, healthcare office managers must check appointment schedules regularly, taking care to note appointments that other office staff members make. If appointments are disregarded or double booked, the system fails. The best way to balance a day's workload is to choose an appropriate scheduling system and use it efficiently. Let's take a closer look at some appointment systems.



Keep everyone updated on schedule changes.

### Open Office Hours

**Open office hours** means a person can walk into an office without an appointment. Open office hours don't usually work well in the average medical office unless it is a designated urgent care clinic that handles walk-ins.

### Scheduled Appointment Systems

Many offices use scheduled appointment systems—especially medical offices. If Brit has an ear ache for two days, she calls her doctor's office and schedules an appointment at a particular time.

Offices that use scheduled appointment systems may make appointments every five minutes on a computer. These offices expect some people to be early, some to be late, some to be on time and some not to show up at all. People without appointments line up for service—they may have a long or short wait depending on the work flow of the day.

There are several different types of scheduled appointment systems. Let's examine a few of the most common ones.

### **Time-specified Appointments**

In a **time-specified system**, each patient gets an assigned appointment time. The time units can be as little as 10 minutes or as much as an hour, depending on need. For example, in a dentist's office that uses 20-minute units, a dentist might request the healthcare office manager put a patient down for two units, or 40 minutes, for an appointment that week.

Usually, no one else has the same time-specified appointment. The advantages to this system are that a patient who arrives on time for an appointment won't need to wait long. Also, you can prepare a patient's file in advance. Finally, the patient receives the full attention of the caregiver she sees.

TUESDAY		MARCH 28, 20XX		
7:00 <sup>AM</sup>		1:00		
7:15		1:15	↓ Bruce J. Bell (924-2378)	
7:30		1:30	↓ (Cap)	
7:45		1:45	↓	
8:00		2:00	↓ Jolene Ramsey (752-2222)	
8:15		2:15	↓ (Exam & Clean)	
8:30		2:30	↓ Jimmy Ramsey (")	
8:45		2:45	↓ (Ch. Exam & Clean)	
9:00	↓ Ronald J. Simpson (727-3480)	3:00	↓ BREAK/BUFFER	
9:15	↓ (Exam & Clean)	3:15	↓	
9:30	↓ Jane L. Owens (752-2626)	3:30	↓ Ramon Garcia (368-5252)	
9:45	↓ (Exam & Clean)	3:45	↓ (Crown/Partial)	
10:00	↓ Linda Martinez (368-4555)	4:00	↓	
10:15	↓ (Root Canal)	4:15		
10:30	↓	4:30	(BUFFER)	
10:45	↓	4:45		
11:00	↓ James Watts (727-3211)	5:00		
11:15	↓ (Crown)	5:15		
11:30		5:30		
11:45		5:45		
12:00 <sup>PM</sup>	\ LUNCH		6:00	
12:15		6:15		
12:30		6:30		
12:45		6:45		
EVENING		NOTES		
7:00				
8:00				

The time-specified system assigns a block of time to each visitor.

The main disadvantage to this system is that there is no room for error. If a patient arrives late or cancels an appointment, it wastes time and throws off the schedule. To avoid wasted time, some offices **double book appointments**, or schedule two appointments at the same time, though this isn't common in medical settings.

The disadvantage to double booking is that when two patients show up at the same time, one patient has to wait. If most patients show up on a certain day, the office quickly falls behind schedule. With double booking, a medical office might fall behind for the entire day. Further, each visit becomes more rushed and impersonal as the doctor tries to make up time.



## Wave Scheduling Appointments

The **wave-scheduling system** bases appointments on the average length of a routine visit. For example, consider a medical clinic that sees an average of four people an hour for about 15 minutes each. Using the wave system, the office administrator schedules four patients each hour, usually on the hour. The doctor sees the patients in the order that they arrive.

The wave system makes it easier for an office to adjust when patients arrive late. The late patients then must wait rather than the staff. Every hour, the staff begins again with a new group of patients. With this system, however, patients might feel that the clinic always runs behind schedule or that it's to their advantage to arrive late. Look at the following example.

MAY APRIL 10

	1:00
	1:15
	1:30
	1:45
Louise Mitchell, Barbara Jones, Eileen Boyd, Renee Larson	2:00
	2:15
	2:30
	2:45
John Wilson, Kyle Martin, Terry Spaulding, Ken Manning	3:00
	3:15
	3:30
	3:45
Mike Long, Harry Jeffries, Sheila James, Dan Patterson	4:00
	4:15
	4:30
	4:45
	5:00
	5:15
	5:30
	5:45

Client Sign-In Sheet	
<i>Please Sign In</i>	
NAME	TIME
<i>Louise Mitchell</i>	<i>1:55</i>
<b>Barbara Jones</b>	<b>2:00</b>
<i>Eileen Boyd</i>	<i>2:15</i>
<i>Renee Larson</i>	<i>2:40</i>
_____	_____
_____	_____
_____	_____
_____	_____

Using the wave system, the office manager schedules several people for the same time slot.

Note that Louise, Barbara, Eileen and Renee were all scheduled to arrive at 2 p.m. However, you see that Renee arrived 40 minutes late. If each preceding appointment took 15 minutes, she only had to wait five minutes. She actually benefits from arriving late.



## **Manage Walk-ins**

While some organizations cater to walk-ins, nearly every office will sooner or later have to deal with such visitors.

### **Greet the Walk-in Visitor**

- Give the walk-in patient the same courtesy as one with an appointment.
- Greet him, and ask the purpose of his visit.
- Give him your undivided attention.
- Don't let the visitor leave your desk empty-handed. Give something to each person you greet: the correct answer to a question, a needed form, directions to another department within the hospital and so on.

Each office treats visits from family members, salespeople and repair people differently. Make sure to refer to your office's policy and procedures manual and apply those policies and procedures with professionalism.

## **Appointment Scheduling Supplies and Equipment**

To schedule appointments, you may use a medical appointment calendar, a typed list, appointment cards and reminder postcards. You might do all of your office's scheduling on a computer. As a healthcare office manager, the tools you use depend on your employee and employer preferences, as well as your own personal preferences.

## **Visitor's Log**

Many medical facilities use a *visitor's log* to stay organized and for security reasons. A **visitor's log** is a simple record of all patients and non-employees who visit the office. The log notes when the visitor arrived, left and the reason for the visit. Note that *Health Insurance Portability and Accountability Act (HIPAA)* regulations—which you'll learn about in a later lesson—require you to keep this log out of sight of other patients and specify that you only use the first names of patients. Another common practice is to use 4 x 4 labels, which the patient uses to sign in with. You'll then remove the label and adhere it to the patient's chart.

## **Appointment Book or Computer Program**

There are many kinds of appointment books and computer programs used to schedule appointments. Most contain pages to record appointments for an entire year. Daily appointment books or computer programs have one or two pages per day, and the pages might be color coded. The divisions of units or time can be anywhere from 10 minutes to an hour or more each.



Weekly appointment books are designed to display one full week when open. Some books or programs divide each day into two or more columns, and you assign each column to a different staff member. This way, you can maintain or read several schedules at once.

The following sample is an appointment scheduler from a program called MedLook. This program allows you to enter appointments into the computer electronically. You will learn more about entering appointments into MedLook in a later lesson.

The screenshot shows the MedLook software interface. The main window displays an appointment scheduler for Thursday, 2/18/2010. The time slots are listed on the left, and the appointments are listed in the center. The right side of the window shows a calendar view for November 2009, December 2009, January 2010, and February 2010.

Start Date/Time	End Time	First Name	Last Name	Status	Procedure	Full Name - Provider	Description
2/18/2010 8:00:00 AM	8:15:00 AM	Kristy	Arnold	Scheduled		Dr. Do A Little	
2/18/2010 9:45:00 AM	10:00:00 AM	Bonnie	Schmidt	Scheduled		Dr. Do A Little	
2/18/2010 11:00:00 AM	11:30:00 AM	Cathy	Harrison	Scheduled		Dr. Do A Little	

Appointments and calendars in MedLook



## Appointment Cards

Have you ever gone to the dentist or eye doctor, and, following your checkup, scheduled your next appointment six months or a year in advance? It can be hard to remember an appointment so far away! Perhaps to help you remember, the healthcare office manager gave you an **appointment card** with the date and time of the appointment written on it, so you could keep it in your wallet or write the date on your calendar. Maybe a few weeks before your appointment, you received a reminder postcard in the mail. These are two techniques offices use to remind patients of their appointments.

<b>APPOINTMENT</b>	
For _____	
On _____	At _____ <b>A.M.</b> <b>P.M.</b>
<b>HERBERT E. ZANDERVAN, M.D.</b>	
<b>850 W. OXFORD ST., SUITE 373</b>	<b>TELEPHONE</b>
<b>CAMBRIDGE, COLORADO 80210</b>	<b>303-555-1234</b>

Appointment cards contain the date and time of a patient's future appointment.

As you can see, using a scheduling system can help you budget your time. When you work as a healthcare office manager, you may use some or all of the systems we discussed. But remember, the type of appointment system you use will depend on the medical setting in which you work. You must properly use these systems for them to work well.

## Reschedule

When a patient calls to cancel an appointment, offer to reschedule her at that time. Find an available time slot, and repeat the new date and time for the patient. If the patient doesn't know when she can reschedule, make sure you note this. Find out from your supervisor if you need to reschedule canceled appointments at a future date.

Sometimes, doctors go out of town or are out of the office for a variety of reasons. They may attend a medical conference, have a family emergency, go on vacation, etc. If you need to cancel an appointment for a doctor, call the scheduled patient as soon as possible.





Follow these guidelines when you cancel an appointment.

1. Express regret on the doctor's behalf, but don't dwell on the apology. Do not mention confidential or private reasons.

WRONG: "Dr. Rudolph has decided to go to her sister's wedding after all." Or "I am so sorry Dr. Rudolph cannot make it. That puts you in a terrible bind, doesn't it?"

RIGHT: I am sorry that Dr. Rudolph won't be able to keep your appointment. She will be out of town."

2. Say that you must reschedule the appointment, and shift to a positive alternative.

WRONG: "I don't see how she'll be able to fit you in with her busy schedule next week."

RIGHT: "She is expected back in town Monday. Shall I set up another appointment for you early the following week?"

Now, let's pause to review the material with the Practice Exercise that follows.



## Step 7 Practice Exercise 2-1

- For questions 1 through 12, select the best answer from the choices provided.

1. **Marta needs to add up the total cost of office supplies for next month. To do this, she should use a \_\_\_\_.**
  - a. copier
  - b. fax machine
  - c. multi-line phone
  - d. calculator
2. **Dan uses the copy machine to \_\_\_\_.**
  - a. make photocopies of insurance cards
  - b. calculate dosages of medicine
  - c. forward calls to the transcriptionist
  - d. send copies of records to other physicians
3. **A \_\_\_\_ allows a person to listen to a recording of the doctor's notes and type them into a computer.**
  - a. dictation machine
  - b. medical transcriber
  - c. voicemail system
  - d. microfilmer



4. **Often, medical offices have specific procedures written in \_\_\_\_ along with other policies. This way, the medical office staff can refer to it for specific instructions on how to open the office or handle visitors.**
  - a. an employee training manual
  - b. transcription
  - c. a policy and procedure manual
  - d. a healthcare office manager list of duties
  
5. **When you open the office, make sure you \_\_\_\_.**
  - a. start the coffee
  - b. call the physician to tell her you've arrived
  - c. pull health records for the day's patients
  - d. print a list of appointments for the next day
  
6. **When you close the office for the day, \_\_\_\_.**
  - a. check the fax machine
  - b. turn on the computers
  - c. pull health records and charts for the next day's patients
  - d. count payments for the day, and prepare a bank deposit
  
7. **When you greet patients, welcome them, make them feel comfortable and \_\_\_\_.**
  - a. help them schedule their next appointment
  - b. answer any questions they may have
  - c. tell them to fill out their forms as quickly as possible
  - d. fax their medical records to their former doctor
  
8. **If you encounter a patient who doesn't speak English very well, speak \_\_\_\_, and watch for nonverbal cues.**
  - a. loudly and clearly
  - b. slowly and spell each word
  - c. to a staff member about hiring an interpreter
  - d. slowly and clearly



9. The \_\_\_\_ appointment system allows a patient to walk into an office without an appointment.
- open office hours
  - time-specified
  - walk-in
  - wave
10. Your medical office makes appointments every five minutes on the computer. What type of appointment system does your office use? \_\_\_\_
- The walk-in system
  - Time-specified system
  - Open office hours
  - Scheduled appointment system
11. A medical office might do all of the following to remind a patient of an appointment except \_\_\_\_.
- send the patient a reminder postcard
  - give the patient an appointment card with the time and date on it
  - e-mail a list of the day's patients, highlighting the patient's scheduled appointment time
  - call the patient to remind him of his appointment
12. The \_\_\_\_ system bases appointments on the average length of a routine visit.
- wave-scheduling
  - double-booked appointment
  - time-specified
  - open office hours

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 **Step 8 Review Practice Exercise 2-1**

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- Check your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.



## Step 9 Manage Mail and Office Correspondence

- ❑ As you can imagine, medical offices receive plenty of mail. In addition, staff in a medical office must send out letters, packages and postcards. As a healthcare office manager, you will manage the mail.

In practices large and small, a healthcare office manager receives all the different types of incoming mail and posts all of the outgoing mail. Larger businesses often have their own mail department or mailroom to sort mail for the whole facility. Even so, mail handling skills and knowledge are essential for a healthcare office manager.

Let's follow Barbara, a healthcare office manager for Carson Medical Center, as she takes care of her office's mail.



Properly process the mail to help the entire office to run smoothly.

### Incoming Mail

Barbara sorts and distributes the incoming mail for two different departments. She sorts it first, then opens it and *date-stamps* it. Then, she places it in the appropriate employee's mailbox.

### Receive Mail

First-class letters aren't the only kind of mail that arrives at Carson Medical Center. Barbara also sorts packages, journals, catalogs, magazines, brochures and even e-mails and faxes. The United States Postal Service (USPS) delivers some items, and private carriers, like UPS, deliver some items. Pat, the regular USPS carrier brings the mail at about 10 a.m. each day, but private messengers and carriers stop at the office throughout the day to drop off and pick up letters and packages. Barbara ensures that all the incoming mail makes it to the proper employee and all of the outgoing mail goes to the correct carrier.

### Sort Mail

This morning, Barbara sorted and opened about 40 pieces of mail. With a large quantity, staying organized is critical. First, she divides the mail into separate stacks as follows:

1. Preference
2. First-class and Priority
3. Interoffice
4. Presorted Standard (Bulk)



## **Preference Mail**

**Preference mail** includes *Express Mail*, certified or registered mail and, in some cases, letters marked Personal or Confidential. Generally, these materials are needed immediately.

In addition to the USPS's one-day Express Mail, other private carriers specialize in overnight delivery across the country or across the world. These include Federal Express, U.S. Express, DHL and Airborne.

## **First-class and Priority Mail**

**First-class mail** includes letters, orders and bills weighing 13 ounces or less. **Priority mail** refers to mail and packages sent first-class weighing more than 13 ounces but less than 70 pounds. First-class and priority mail is important, but it has lower priority than the preference mail. Usually, overnight services wouldn't be used for these items.

## **Interoffice Mail**

Memos, copies to file and directives (letters or notices sent to everyone within a medical facility) are in the category of interoffice mail. Although these items may need to be delivered quickly, handling them is easier because no outside mail service is involved.

## **Standard Mail (Bulk)**

Much of the mail a business receives is standard mail. This mail used to be called "bulk mail." Retailers and other advertisers use this type of mail primarily to promote products and services. Standard mail is used when items that weigh more than 16 ounces (such as books, catalogs and parcels) are mailed. Parcel post, media mail and bound printed matter are all subclasses of standard mail.

## **Opening Mail**

After she sorts the mail, Barbara opens each item and date-stamps it. She used to do this by hand, but the company just bought a machine that automates that process for her. Barbara never opens an envelope labeled *Personal* or *Confidential* unless it's addressed to her. After she opens non-confidential envelopes, she removes the contents and clips the envelope and any enclosures to the letter.

While some companies throw away the envelopes of incoming mail, other companies—like Carson Medical Center—ask that the envelope be kept. This preserves the postmark with its cancellation date and return address.



## **Date-stamping**

**Date-stamping**, which sometimes records the hour and minute as well as the date, is important for verifying receipt of a potentially important item, such as payment of a bill. It also acts as a reminder for the person in charge of an incoming item. It helps ensure that she quickly acts upon customer complaints and problems. Barbara always stamps the mail in the same place. This way, anyone looking for the date stamp will know where to look on each piece of mail.

## **Mail Registers**

Barbara uses a **mail register** to keep track of incoming and outgoing packages. She notes if they are registered, certified or insured, as well as the name of the carrier. Mail registers, also called mail logs, help her keep track of items that arrive in different packages at different times. This way, nothing gets lost or forgotten.



Some offices still use multiple hand stamps to help traffic the mail.

## **Distribute Mail**

Barbara's final responsibility with incoming mail is to distribute it as soon as possible. While her last job had her deliver mail to everyone's desk, Carson Medical Center has a centralized wall of employee mailboxes. Barbara arranges each pile of mail with the highest priority items on top, down to the lowest priority—the standard mail items—on the bottom.

## **Forward Mail**

Some mail inevitably gets sent to the wrong address. Barbara forwards this mail to help put it back on track. She re-mails it with an explanatory note for the post office. This service is free.

There are several reasons to forward mail:

1. If mail is addressed to a former employee or one who was transferred, cross out the given address, and write the updated address next to it:  
*"Please forward to 4415 Murietta Ave., Sherman Oaks, CA 91423."*
2. If mail is addressed to previous building owners or tenants, and you don't have their new addresses, write:  
*"Addressee no longer at this address—no forwarding address available" or "Please return to sender—addressee no longer here."*
3. If mail is addressed to someone you don't know, check to ensure this isn't a new employee or visiting consultant. If it isn't, write *"Addressee unknown."*



## Outgoing Mail

At Carson Medical Center, Barbara also handles all outgoing mail. She must see that each item to be mailed gets sent with the right carrier. She also must ensure that each item is addressed correctly and that it gets sent in the right class of mail with the appropriate service, if applicable.

First, she prepares all the letters and packages for mailing. Then Barbara sorts them by mailing class depending on how fast each needs to arrive and at what cost. After that, she fills out the paperwork for any extra services, like registered or certified mail, and applies the postage.

### **Prepare Letters and Packages for Mailing**

The best way to prevent lost or damaged mail is to address items correctly. Barbara follows the tips that the USPS gives.

#### **The Address**

All mail needs a mailing address and should have a return address. For both, include the following:

*Name, if any*

*Business, if any*

*Street address, including apartment or post office box or rural route number*

*City, state abbreviation and ZIP code*

#### **Use ZIP Codes**

The five digit *ZIP code* is very important in the processing and delivery of mail. The **ZIP code** identifies the item's destination or origin. You can find out a ZIP code from a ZIP code directory, online or from your local post office.

The first digit of a ZIP code represents a group of states. Each group is then divided into an average of 10 smaller areas. The second and third digits of your ZIP code each represent those smaller areas. The fourth and fifth digits of your code identify your post office.

In 1983, the USPS began to use an expanded *ZIP+4 code*. The additional four digits identify your city block or office building. The **ZIP+4 code** looks like this: 91001-3240. The longer code assists the postal service and can speed up the processing of your mail.



Packages require special attention.



## **Address with Barcodes**

A service that allows speedier reading and sorting of mail is called **barcoding**. Carson Medical Center uses barcoding equipment that applies a coded bar to each piece of mail. It prints the coded bar on the lower right-hand corner of the envelope, which represents the ZIP+ 4 code plus two additional numbers to identify the receiver's address. Finally, a 12th number is added as a check digit. Today, word processing software can automatically add the barcode to an envelope.

Because the mail is already barcoded, the post office can sort it automatically. Not only does this save time and money for the post office, but Carson Medical Center gets a discount rate on mailings of at least 250 pieces. Plus, delivery is more accurate, and turnaround is speedier.

## **Classes of Business Mail**

Barbara divided the outgoing mail into **classes**, or mail categories of different speeds of delivery and costs. For more information on different mail classes, check out the United States Postal Service Web site at [www.usps.com](http://www.usps.com), or visit your local post office.

### **Express Mail**

If you have mail that must get to its destination in a hurry, you might use *express mail*. **Express mail** arrives the next day by noon or 3:00 p.m. to most addresses in the United States. This includes Sundays and holidays. Express mail is delivered 365 days a year and is automatically insured for \$100 against loss or damage. Also, it provides a signature proof of delivery upon request, as well as tracking information. However, express mail items must be mailed by a certain time. Check with your local post office for details.

### **First Class and Priority Mail**

Most business mail travels first class. (Whenever Barbara sends material that isn't business-letter size, she stamps it "first class.") Generally, first class gets delivered overnight within a city and within two days inside a state. For distances greater than 600 miles, mail service should take three days but can take more.

### **Standard Mail**

Businesses that do large mailings generally use standard mail. These companies can take advantage of discounts that the USPS offers if they presort, barcode and arrange their mail. Carson Medical Center uses standardized mail to send out its *Health News* monthly newsletter and other mass mailings.

Since standard mail is slower than first class, it's typically used for mail that doesn't need to meet a tight deadline. Check with your local post office for delivery times, bulk-mailing rules and discount prices.





## **Extra Mailing Services**

Sometimes speed and cost aren't the only concerns with outgoing mail. Often, Barbara needs to know that an addressee received a letter and when, or she needs insurance on a valuable package. The following are different services that the USPS provides to meet these needs.



Since most mail travels by plane these days, "air mail" is seldom specified.

**Registered Mail:** Registered mail provides thorough security and insurance for articles up to \$25,000. It comes with a mailing receipt and access to online tracking of the delivery system.

**Certificate of Mailing:** This gives proof that an item was mailed.

**Collect on Delivery (COD):** While COD usually isn't used between offices, many companies use it as a way to send merchandise. The mailer collects the price of goods and postage upon delivery, which may not exceed \$1,000.

**Delivery Confirmation:** Delivery confirmation shows the date and time of delivery or all of the attempted deliveries.

**Insured Mail:** For protection against lost or damaged mail while it's in transit, the USPS offers insurance depending on the class and value of the item mailed.

**Restricted Delivery:** With restricted delivery, the mailer only delivers an item to the addressee or addressee's authorized agent. This is useful for confidential and very personal mail items.

**Return Receipt:** If you need proof of delivery, a return receipt is recommended.

**Signature Confirmation:** With signature confirmation, the addressee must sign as proof of delivery. The time and date are also noted. It is more expensive than a plain return receipt, but it is also more thorough.

**Special Handling:** While this isn't a form of insurance, mail items with Special Handling receive preferential treatment. This is great for goods like perishables.

Stop by your local post office and examine all the receipts of the different mailing services. Some of them can be combined—like registered mail and signature confirmation—to tailor your mailing needs to each item.

## **Apply Postage to Letters and Packages**

Barbara checks each piece of mail to ensure it has the correct postage. For this, she uses a postal scale and a postal meter to save time and money.



## Postal Scales

**Postal scales** weigh letters and packages to accurately calculate postage. Some electronic scales even compute the least expensive rates for items. This precise weighing of items and the accurate calculation of zone rates cuts costs considerably.

## Postage Meters

A **postage meter** is a machine that imprints an accurate amount of postage on a mail item. Many businesses use a postage meter for convenience and speed. The meter offers many advantages. The postage meter:

- Ensures accurate postage
- Reduces time spent in manual stamping
- Produces stamps of any value, so there's no need to keep various denominations of stamps on hand
- Prints a high-quality stamp image
- Speeds mail delivery, since items are pre-canceled by meter
- Protects the business against unauthorized use of stamps



Postage meters imprint the postage on a piece of mail.

To use the postage meter, Barbara weighs each item on the postal scale. Then, she inserts each letter into the meter where the postage, postmark and date are imprinted. For items too big for the meter, the machine prints a sticker that Barbara applies to the package.

The post office maintains Carson Medical Center's active postage meter account and leases the meter to the business. Barbara monitors the amount of postage in the account and buys more from the post office when the center runs low.

## Handle E-mail

Barbara receives numerous e-mails throughout the day and must organize and distribute them, as well. E-mail programs have simplified some of her responsibilities.

When she opens her e-mail account—which acts as both her mailbox and filing cabinet—she has a directory of folders to choose from: *inbox*, *outbox*, *drafts* and *junk mail*. While different e-mail programs use different names and formats, all of them share these basic features.

The **inbox** is a folder that saves all incoming mail in the order it was received. E-mails that haven't been opened are highlighted. Therefore, Barbara can tell at a glance which mail is new and which is old. Just like a normal mailbox, e-mail accounts receive junk mail, called **spam**. You can automatically set up spam to divert into a special junk-mail folder. This prevents Barbara from losing an important e-mail in a pile of unwanted ones.



When Barbara sends an e-mail, it saves in her **outbox** or **sent mail**, which are folders that contain a person's sent messages. Such folders allow her to keep track of her outgoing mail. With her busy schedule, sometimes Barbara needs more than one sitting to finish important or long e-mails. The **draft** folder in her e-mail account lets her save e-mails that she isn't finished writing.

There is yet another handy feature to help organize e-mail. When she receives a lot of e-mail on one topic, Barbara creates a new folder in her e-mail account to store all those messages in one convenient place.



Most businesses these days rely on e-mail to communicate.

## **Respond to Web Inquiries**

Many medical facilities, such as hospitals and physician practices, have Web sites. Potential patients can learn more about the facility and ask questions through the site. In a larger facility, someone might be designated to address these inquiries, but typically this job belongs to a healthcare office manager. Inquiries can vary from questions about hours to whether the office accepts a particular insurance. If you don't know the information a person requests, you can either talk to someone in the office, research it yourself or forward the inquiry directly to another person. Either way, respond in a timely and professional manner. The inquiries come from your patients or potential patients, and your contact with them reflects on the practice.



## **Step 10 General Office Management**

- ❑ In addition to managing health records, healthcare office managers have other responsibilities. They include ordering supplies, using time effectively, establishing policies and procedures and educating patients.

### **Replenish Supplies**

Can't find a pen? No more copier toner? Running out of basic office supplies can frustrate you and the patient and reflects poorly on your medical office. Keep an inventory of your office's supplies, and order when they get low. This way, you never run out completely.

You can choose from many different office supply companies, but find out if your office prefers a particular company. Most likely, you can order through mail, fax, phone or the Internet.



## Policies and Procedures

You briefly learned about the policy and procedures manual earlier in the lesson. As a healthcare office manager, you may need to help develop the manual or update it. Basically, a **policy and procedure manual** is a binder or booklet that holds written policies and procedures for your office. It serves as a reference for all of the office's employees, as well as a manual for training new employees.

Policy and procedure manuals may contain some of the following policy topics:

- Overtime
- Health insurance
- Vacation time/sick leave
- Work breaks
- Timekeeping
- Terminations

**Procedures** are step-by-step lists of how to perform particular tasks. These serve as an educational tool and reduce confusion about procedures. Every staff member should be able to offer ideas about the procedures in the manual. Each procedure should include the date that it was established so that if a new procedure is written, the old procedure can be recognized and removed.

Here are some procedure topics that could be included in a manual:

- Physical measurements, vital signs, temperature, pulse, respiration, weight and height
- Medical history and physical examinations
- Collecting and handling specimens
- Common emergencies and first aid
- Emergency preparedness
- Computer back-up procedures
- Office opening/closing procedures



## Time and Task Management

Healthcare office managers have busy days, and effective time management is important. Sometimes, you might feel like there's never enough time to complete all the projects and tasks you need to. Follow these tips to help you make the most of your time.



Healthcare office managers have busy days, and effective time management is important.

### Time-Management Tips

1. Write down your time-saving ideas. For example, if you know the post office gets busiest early in the morning, make your post-office run in the mid-morning or mid-afternoon. That way, you miss the rush, and don't waste time standing in line.
2. Invest the first 10 minutes of the morning planning your day. Invest the last 10 minutes of the day writing your goals, priorities and "Things to Do" list for the following day.
3. Though you also need to answer phones and greet patients, try to block out time to work undisturbed on important projects whenever possible.
4. Assign yourself deadlines to keep yourself focused on important projects.
5. Identify your prime times—times when you feel most alert and productive. If you are a morning person, plan your most important work for the morning hours. Plan your easiest tasks during your slower, less productive times.
6. Learn to say "no" or to delegate jobs to others when appropriate. When you delegate, you transfer and entrust your power or work to someone else. For example, Dolce works as a healthcare office manager. She needs to complete two large assignments by the end of the morning. She doesn't have enough time to do both jobs well. She asks her supervisor which task takes higher priority. Dolce then asks for help from her coworker, with her supervisor's permission, to complete the other less-urgent project.

Once you get more comfortable in your healthcare office manager position, your time-management skills will strengthen with practice. However, with so many different responsibilities, you may wonder how healthcare office managers stay on task. One way is through the use of goals. Let's learn more!



## **Set Goals**

Set *goals* to help manage your projects and your time. **Goals** describe objectives that you want to achieve. To take control of your time, consider these steps to ensure successful goal-setting.

### **Steps to Successful Goal Setting:**

1. Set challenging goals whenever possible.
2. Set realistic goals.
3. Set goals that work for YOU.
4. Set specific goals.
5. Set a variety of goals.
6. Set goals that provide pleasure.
7. Be flexible when you set goals.

You must set long- and short-range goals. For example, you may want to complete your Healthcare Office Manager course. This demonstrates a long-range goal—it may take some time to achieve. However, a first step—a short-range goal that you can achieve in relatively little time—might be to enroll in the course. Then you might set target dates by which you wish to complete each pack or each lesson.

Research shows that an individual often reaches a long-range goal of four or five years in only half the time—once an individual becomes dedicated to a goal. Moreover, people make better employees when they plan, set goals and make the most of their time.



## **Step 11 Patient Education**

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- ❑ All healthcare office managers can educate their patients. An informed patient feels more relaxed and cooperates more than an uninformed patient. For example, a patient injured his knee skiing earlier in the day and just finished his appointment with the doctor. The doctor recommended that he go to another office for an MRI on his knee. The patient feels a little uneasy about the test. The healthcare office manager provides him with a pamphlet about the MRI and answers his questions. The patient now better understands the test's purpose and procedure.

What kind of education do healthcare office managers provide? All kinds! As a healthcare office manager, you can provide information about medical facilities, health and wellness, therapeutic agencies and social services. In addition, you can answer administrative questions about policies and procedures. This knowledge can ease your patients' minds and increase their confidence in your medical facility.

In a moment, we'll wrap up this lesson. But, first, complete the Practice Exercise that follows.



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 **Step 12 Practice Exercise 2-2**

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For questions 1 through 13, select the best answer from the choices provided.

1. **Examples of \_\_\_\_\_ mail include express mail, certified or registered mail and letters marked “Personal” or “Confidential.”**
  - a. preference
  - b. first-class
  - c. priority
  - d. standard
  
2. **An average, everyday letter with a stamp travels by \_\_\_\_\_ mail.**
  - a. express
  - b. first-class
  - c. priority
  - d. standard
  
3. **You should sort memos and directives as \_\_\_\_\_ mail.**
  - a. preference
  - b. priority
  - c. interoffice
  - d. standard
  
4. **\_\_\_\_\_ records the day and time you receive an item in the mail.**
  - a. The post office
  - b. Date-stamping
  - c. Mail-tracking
  - d. A postage meter
  
5. **You receive a piece of mail that was sent to the wrong address. You should \_\_\_\_\_.**
  - a. throw it away
  - b. place it in the “wrong address” file
  - c. open it
  - d. forward it
  
6. **To prevent lost or damaged mail, you should \_\_\_\_\_.**
  - a. deliver it yourself
  - b. address it correctly
  - c. insure your mail
  - d. certify your mail



7. Dan's ZIP code is 12345. The "1" stands for a \_\_\_\_\_.
  - a. country
  - b. group of countries
  - c. state
  - d. group of states
  
8. Maggie's ZIP code is 45140. The "40" in the ZIP code represents a \_\_\_\_\_.
  - a. city block
  - b. specific post office
  - c. street
  - d. county
  
9. Yancey needs next-day delivery to mail a contract to someone in Montana. He should use \_\_\_\_\_ mail.
  - a. express
  - b. first class
  - c. priority
  - d. standard
  
10. Methods used to earn discounts from the USPS include presorting, \_\_\_\_\_ and arranging large mailings.
  - a. registering
  - b. certifying
  - c. insuring
  - d. barcoding
  
11. Meghan places a package on a \_\_\_\_\_ in her office and finds that it weighs 2 pounds and 4 ounces. The machine calculates the postage to be \$8.85.
  - a. postal scale
  - b. postage meter
  - c. postal scanner
  - d. postage vendor
  
12. Bert has a stack of 500 postcards that advertise the dental practice he works at. He runs each postcard through a \_\_\_\_\_, and the machine imprints an accurate amount of postage on each one.
  - a. postal scale
  - b. postage meter
  - c. postal scanner
  - d. postage vendor





13. **Bernadette arrives at work, Columbia Clinic, and turns on her computer. She opens her e-mail and sees that she has 15 new, incoming messages from patients in her \_\_\_\_.**
- a. inbox
  - b. outbox
  - c. spam folder
  - d. draft folder

For questions 14 through 17, match each service with its description.

- |                                     |  |
|-------------------------------------|--|
| 14. ____ <b>Registered mail</b>     | a. Protects against loss or damage of an item while it's being mailed.                         |
| 15. ____ <b>Insured mail</b>        | b. Gives delicate items preferential treatment.  |
| 16. ____ <b>Restricted delivery</b> | c. Tells the mailer to only give the item to the addressee.                                    |
| 17. ____ <b>Special handling</b>    | d. Provides thorough security and insurance, as well as a mailing receipt and online tracking. |

For questions 18 through 20, select the best answer from the choices provided.

18. **Carol needs to complete two large projects in the next two hours. She knows she won't have time to complete both. Carol should \_\_\_\_.**
- a. set more short-range goals
  - b. set more long-range goals
  - c. plan her day more thoroughly
  - d. delegate work to a co-worker
19. **Daniel decides he wants to learn to transcribe medical dictations. To do this, he enrolls in a medical transcription course. Daniel's decision to learn about medical transcription describes a \_\_\_\_.**
- a. long-range goal
  - b. short-range goal
  - c. priority
  - d. delegation
20. **Daniel's action of enrolling in a medical transcription course describes a \_\_\_\_.**
- a. long-range goal
  - b. short-range goal
  - c. priority
  - d. delegation



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## Step 13 Review Practice Exercise 2-2

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- Check your answers with the Answer Key at the back of this instruction pack. Correct any mistakes you may have made.



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## Step 14 Lesson Summary

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- This lesson introduced you to valuable information about several important healthcare office manager duties. You now know how to effectively greet patients, answer questions and handle the phone calls that you're likely to receive. And, you gained a strong understanding of how to handle mail and schedule appointments.

We also discussed the healthcare office manager's daily tasks. You discovered new ways to manage your time, prioritize and set goals. The skills you learned in this lesson will benefit you throughout your career as a healthcare office manager. Now, it's time to put that knowledge to use and take another quiz.



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## Step 15 Mail-in Quiz 2

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- Follow the steps to complete the quiz.
  - a. Be sure you've mastered the instruction and the Practice Exercises that this quiz covers.
  - b. Mark your answers on your quiz. Remember to check your answers with the lesson content.
  - c. When you've finished, transfer your answers to the Scanner Answer Sheet included. Use only blue or black ink on your Scanner Answer Sheet.
  - d. **Important!** Please fill in all information requested on your Scanner Answer Sheet or when submitting your quiz online.
  - e. Submit your quiz to the school via e-mail, mail, fax or, to receive your grade immediately, submit your answers online at [www.uscareerinstitute.edu](http://www.uscareerinstitute.edu).



## Mail-in Quiz 2

For questions 1 through 4, match the piece of equipment on the left to its use on the right. Each question is worth 3.3 points.

- |                                    |   |
|------------------------------------|---|
| 1. ____ <b>Fax machine</b>         | a. Answer and transfer calls without a receptionist |
| 2. ____ <b>Voicemail</b>           | b. Voice record notes                               |
| 3. ____ <b>Medical transcriber</b> | c. Send copies of documents to other providers      |
| 4. ____ <b>Dictation machine</b>   | d. Type voice recorded notes into a computer        |

For questions 5 through 16, select the best answer from the choices provided. Each question is worth 3.3 points.

5. **Microfilm** \_\_\_\_.
- a. produce copies that you can easily read
  - b. automatically fax documents directly from the microfilm
  - c. reduce the amount of space needed to store documents
  - d. provide good security because document retrieval is difficult
6. **It's your first day on the job, and your supervisor tells you that you need to open the office in the morning; however, he doesn't explain what you need to do. What should you do?** \_\_\_\_
- a. Ask another staff member.
  - b. Consult the policy and procedures manual.
  - c. Tell the office manager you can't do it.
  - d. Do what you think is best; someone will fix whatever you've done wrong.
7. **Nina works as a healthcare office manager. One day, while filing, a patient walks up to her desk and begins to yell at her about his bill. He claims he was overcharged and wants Nina to fix it immediately. Nina should** \_\_\_\_.
- a. remain calm
  - b. tell the patient he must calm down before she can help him
  - c. tell the patient she can't fix it; he needs to contact his insurance company
  - d. call security right away



8. **After Nina assists the angry patient, an unsolicited salesperson enters the office. She wants to speak with the doctor immediately about her product. Nina should \_\_\_\_.**
  - a. page the doctor and ask him if he's available
  - b. ask the woman to leave unless she wants to deal with security
  - c. take the saleswoman's brochures and ask her to come back when the doctor is at lunch
  - d. turn the saleswoman away, then continue to repeat her apology until she leaves
  
9. **Nina's patient arrives extremely early for his appointment. It's a man and his six-year-old son, Tommy. Tommy is bored to tears, and his dad forgot to bring toys for him to play with. To quiet Tommy, Nina should \_\_\_\_.**
  - a. give Tommy some scrap paper and crayons
  - b. ask Tommy's dad to please calm him down
  - c. sit in the waiting room and play with Tommy until it's time for his dad's appointment
  - d. move Tommy's dad's appointment ahead of the other patients
  
10. **Joani, the office billing specialist, is bilingual. She speaks both English and Spanish fluently. This skill is important because \_\_\_\_.**
  - a. she can prepare insurance claims in both languages
  - b. Joani can market the doctor's practice to Spanish-speaking friends
  - c. Joani can teach Spanish to the rest of the staff
  - d. Joani can interpret when Spanish-speaking patients come in for an appointment
  
11. **The two fundamentals of effective phone skills are \_\_\_\_.**
  - a. to pick up on the first ring and market the practice to the caller
  - b. to make a favorable impression in the first 10 seconds and never put callers on hold
  - c. warm confidence and genuine concern
  - d. professionalism and composure



12. One day, Nina stays home with a cold, so Ruth, the office's medical biller, answers the office phones. When the phone rings, she greets the caller, then places him on hold while she answers the next call. When she has all five lines on hold, she then goes back to Caller 1 and asks who he needs to speak with. By this time, the caller is angry and frustrated. What did Ruth do wrong, and how can she correct it? \_\_\_\_
- a. Ruth kept the callers on hold too long. She should transfer each call as it comes in and only put callers on hold if they need more assistance. She should then go back to the calls on hold in the order they were received and apologize for the wait.
  - b. Ruth should never put a caller on hold. She should handle calls in the order they come in. She should let the second line ring while she helps Caller 1 with his question.
  - c. Ruth answered too many lines at once. Since she didn't know how to handle the phones as well as Nina, next time, Ruth should take Lines 2 through 5 off the hook so they won't ring.
  - d. Ruth should never put a caller on hold. She should transfer each call as it comes in, apologize to those who need more assistance and ask them to call back later.
13. Appointments work better in the medical office than allowing walk-ins because \_\_\_\_.
- a. you can schedule appointments when the patient walks in the door
  - b. walk-ins don't allow the practice to have forms filled out beforehand
  - c. the office can prescreen patients who set appointments to make sure they can pay their bill
  - d. appointments keep work flowing and allow patients the time they need to discuss their problems



14. **The three basic things you should consider when you set appointments include your boss's preferences, the time given to each appointment and \_\_\_\_.**
- a. the amount of time in between each appointment
  - b. whether the appointment times should vary
  - c. which types of appointment should receive priority
  - d. when the doctor takes his lunch
15. **Maggie is making an appointment for Mr. Rogers. She has his name, date of birth, phone number, insurance information and the name of the referring physician. As she hangs up, she realizes she forgot one piece of information. What is it? \_\_\_\_**
- a. Mr. Rogers' address, so she can mail him a reminder postcard
  - b. The reason Mr. Rogers needs to see the doctor
  - c. Mr. Rogers' employer
  - d. Mr. Rogers' Social Security number
16. **Dr. Martin asks you to schedule a buffer period at 3 p.m. each day. During the buffer period, you can schedule \_\_\_\_.**
- a. old patients
  - b. new patients
  - c. patients who need a follow-up appointment
  - d. patients with an urgent or emergent problem

For questions 17 through 20, match the type of appointment system on the left with its advantages on the right. Each question is worth 3.3 points.

- |  |  |
|--|--|
| 17. ____ <b>Open office hours</b>            | a. Easy for an office to adjust when patients arrive late                            |
| 18. ____ <b>Scheduled appointment system</b> | b. Patients with the most urgent need can be seen first                              |
| 19. ____ <b>Time-specified appointments</b>  | c. Patients who arrive on time don't have to wait, and files are prepared in advance |
| 20. ____ <b>Wave-scheduled appointments</b>  | d. Can accommodate patients who arrive early, on time, late or not at all            |



For questions 21 through 24, read each sentence, and decide if it is an appropriate response to a patient when explaining a canceled appointment. Place an *a* by appropriate responses, and place a *b* by inappropriate responses. Each question is worth 3.3 points.

21. \_\_\_\_ “I’m sorry, but Dr. Akbar is unable to meet with you today. May I reschedule your appointment?”
22. \_\_\_\_ “I can’t reschedule you until next Friday, but Dr. Moore usually goes skiing on Fridays, so I’ll have to ask her if she wants to see you.”
23. \_\_\_\_ “Dr. Martinez left town for an emergency, but he will be back next Monday. Can I reschedule your appointment for Monday?”
24. \_\_\_\_ “Dr. Change forgot she had a medical conference in Toledo next week. Do you mind if we reschedule?”

For questions 25 through 30, select the best answer from the choices provided. Each question is worth 3.3 points.

25. **A young man arrives at the office with a sprained ankle. He doesn’t have an appointment. What should you do?** \_\_\_\_
- Tell him where the nearest emergency room is.
  - Greet him, and ask what the problem is. Determine if the injury is an emergency. If not, and you have a buffer period soon, schedule him for that time. If it is an emergency, help him locate the nearest urgent care clinic.
  - Greet him and determine if the sprain is an emergency. If so, ask the patient to wait in the nearest open exam room. Explain the situation to the doctor, and ask if she can see him before the next scheduled patient or during her lunch hour.
  - Give the patient a brochure on how to care for a sprain, and ask him to make an appointment for later in the week.
26. **Gretchen finished sorting the morning mail. Next, she should \_\_\_\_.**
- deliver it to the correct department
  - date-stamp it and make a copy
  - enter each piece in a mail register
  - open and date-stamp it
27. **To prevent lost or damaged outgoing mail, \_\_\_\_.**
- send it by express mail
  - use the ZIP+4 code
  - address it correctly
  - ensure that it has the correct postage



- 28. The best time to order supplies is when \_\_\_\_.**
- a. supply is getting low
  - b. supply is still high
  - c. the items run out
  - d. you have time to do it
- 29. When a medical office puts together a policy and procedures manual, \_\_\_\_.**
- a. every staff member should be able to offer input
  - b. only the medical office manager and physician should write the policies and procedures
  - c. the policies and procedures can't be revised
  - d. the less detailed it is, the better
- 30. Successful goal setting involves all of the following except \_\_\_\_.**
- a. set specific goals so that you can measure how well you're doing
  - b. set a variety of goals that work towards the completion of your project
  - c. be flexible so that when the situation changes, you can revise the goal
  - d. make goals unrealistic so that they provide a bigger challenge





# *Congratulations*

You've completed Lesson 2.



Don't wait for your quiz results to continue with Lesson 3.