

SECTION IV PROFESSIONAL PROCEDURES

UNIT 10 CLINIC AND HUMAN RESOURCES MANAGEMENT

CHAPTER 45

THE MEDICAL ASSISTANT AS CLINIC MANAGER

Overview

Medical assisting students are introduced to the responsibilities and duties of the clinic manager. This chapter introduces students to the staff member most likely to manage the daily operations of the medical practice. Discussed are such duties as coordinating staff meetings, preparing meeting agendas and minutes, making travel arrangements, compiling a clinic policy and procedures manual, processing payroll, and establishing risk management protocols. Students recognize the potential of pursuing the long-term goal of becoming a clinic manager in an ambulatory care setting.

Lesson Plan

I. LEARNING OUTCOMES	ABHES	CAAHEP
A. Define, spell, and pronounce the key terms as presented in the glossary.		
B. Describe the qualities of a manager.	1.d	
C. Discuss characteristics of managers and leaders.		
D. Differentiate between authoritarian and participatory management styles.		
E. Describe management by walking around and its usefulness in ambulatory care settings.		
F. Recall a minimum of four common risks and risk-control measures.		
G. List three benefits of a teamwork approach.		
H. Discuss the importance of a meeting agenda.		
I. Describe appropriate evaluation tools for employees.		
J. Recall effective methods of resolving conflict.		
K. Identify the steps required to make travel arrangements.		
L. Define the term itinerary and list important information the itinerary should contain.		
M. List three methods of increasing productivity and efficient time management.		V.A.2 V.C.13
N. Describe the purpose of a procedure manual.	4.c, d, e	
O. Discuss the impact of HIPAA's privacy policy in ambulatory care settings.		IX.C.3 IX.P.4
P. Describe the general concept of marketing and recall at least three marketing tools.		
Q. Discuss the role of social media in the medical clinic.		V.P.7
R. Describe the purpose and benefit of marketing.		V.P.7
S. Discuss the steps involved in the inventory of administrative and clinical supplies and equipment.	8.x.2	V.P.10
T. Discuss the steps involved in administrative and clinical equipment calibration and maintenance.	8.x.y	V.P.9 V.C.14
U. Analyze the professionalism questions and apply them to this chapter's content.		

II. PROFESSIONALISM QUESTIONS

A. Communication

1. Did you display appropriate body language?
2. Did you demonstrate empathy in communicating with patients, family, and staff?
3. Did you apply active listening skills?
4. Did you demonstrate awareness of how an individual's personal appearance affects anticipated responses?
5. Does your knowledge allow you to speak easily with all members of the health care team?
6. Did you follow up with collateral allied health professionals to optimize the patient's plan of care?

B. Presentation

1. Were you dressed and groomed appropriately?
2. Did you display a positive attitude?
3. Did you display a calm, professional, and caring manner?

C. Competency

1. Did you pay attention to detail?
2. Did you ask questions if you were out of your comfort zone or did not have the experience to carry out tasks?
3. Did you display sound judgment?
4. Were you knowledgeable and accountable?
5. Did you recognize the importance of local, state, and federal legislation and regulations in the practice setting?

D. Initiative

1. Did you show initiative?
2. Did you develop a strategic plan to achieve your goals? Was your plan realistic?
3. Did you seek out opportunities to expand your knowledge base?
4. Were you flexible and dependable?
5. Did you implement time management principles to maintain effective office function?
6. Did you assist coworkers when appropriate?
7. Did you seek ways to improve the morale of your work place?

E. Integrity

1. Did you work within your scope of practice?
2. Did you acknowledge the scope of practice of other health care professionals?
3. Did you protect personal boundaries?
4. Did you demonstrate respect for individual diversity?
5. Did you immediately report any error you had made?
6. Did you report situations that were harmful or illegal?
7. Did you maintain your moral and ethical standards?
8. Did you do "the right thing" even when no one was observing?

III. REFERENCES

- A. Lindh, Wilburta Q., Pooler, Marilyn S., Tamparo, Carol D., Dahl, Barbara M., & Morris, Julie A., *Delmar's Comprehensive Medical Assisting: Administrative and Clinical Competencies*, 5e
- B. See text Chapter 45, References/Bibliography
- C. Any other teacher-preferred reference material

IV. VISUAL AIDS

- A. Computer access to identified Internet resources
- B. Any other teacher-preferred visual aids (PowerPoint, etc.)

V. EQUIPMENT AND MATERIALS

- A. Computer, TV monitor, and Internet access
- B. Samples of management forms
- C. See IV: Visual Aids

VI. SAFETY

- A. Basic classroom procedures

VII. PREPARATION

- A. Arrange for visual aids equipment.
- B. Collect materials.
- C. Review Chapter 45 in the text, the Study Guide, the Competency Manual, and the Instructor's Manual.

VIII. INTRODUCTORY REMARKS/ACTIONS

- A. Read Learning Outcomes in the text with students to introduce the chapter.
- B. Ask, "How important is the clinic manager to the provider's practice?"
- C. Ask students what qualities a professional clinic manager should have and list them on the board.
- D. Read through and discuss the opening scenario and introduction to this chapter.

IX. PRESENTATION

- A. The Medical Assistant as Clinic Manager
 1. Duties are vast and varied
 2. Duties depend on the policies of the medical practice
- B. Qualities of a Manager
 1. Leader versus authoritarian manager (Table 45-1)
 2. Effective communication skills
 3. Fair-mindedness
 4. Objectivity
 5. Organizational skills
 6. People skills
 7. Problem-solving skills
 8. Technical expertise
 9. Truthfulness
 10. Figure 45-1
- C. Clinic Manager Attitude
- D. Professionalism
 1. Assign or discuss the Critical Thinking box
 2. When working as a liaison, review Chapter 5, Procedure 5-1: Identifying Community Resources
- E. Management Styles
 1. Authoritarian Style
 2. Participatory Style
 3. Management by Walking Around
- F. Risk Management
 1. Identify probable risks and take control measures
 - a. Loss of a critical employee
 - b. Failure of a supplier or contractor
 - c. Accidental disclosure of confidential information
 - d. Computer failure
 - e. Injury to a staff member or nonemployee
 - f. Managerial position change
 - g. Assign or discuss the Critical Thinking box
 - h. Incident reporting (Procedure 45-1)
- G. The Importance of Teamwork
 1. Improved efficiency of the clinic
 2. Builds morale
 3. Results in team member ownership
 4. "Work smarter"
 5. Getting the Team Started
 - a. Results of clear vision, specific goals, and well-planned strategy of team leader
 - b. Team members must understand and support specifics
 - c. Team should create its own work statement
 - (1) Ownership
 - (2) Outlines specific tasks and sequential order
 - (3) Ensures that everyone works toward team goals and objectives
 - d. Pitfalls
 - e. Establish timetable for achieving results
 - f. Identify standards

6. Using a Team to Solve a Problem
 - a. Brainstorming
 - b. Prioritization of solutions
 - c. Benchmark your facility
 7. Planning and Implementing a Solution
 - a. Make assignments
 - b. Define resources of equipment and funds available
 - c. Assign problems to subteams
 - d. Continue to meet as subteams and discuss progress
 8. Recognition develops team spirit
- H. Supervising Personnel
1. Staff and team meetings
 - a. Clinic manager initiates staff meeting and officiates (Figure 45-2)
 - b. Procedure 45-2: Preparing a Meeting Agenda
 - c. Use of basic parliamentary procedure
 - d. Announced well in advance
 - e. Agenda provided (Figure 45-3)
 - f. Ended with nonagenda items
 - g. Ending time
 - h. Rate meeting's value
 - i. Minutes of the meeting
 2. Conflict Resolution
 - a. Solving problems between any two parties
 - b. Often caused by poor communication or misunderstandings
 - c. List of guidelines
 3. Harassment in the Workplace
 4. Assimilating New Personnel
 - a. Goal of assimilation
 - b. Clinic manager and human resources personnel work together
 5. New personnel orientation
 - a. Orienting and training new employees to protocols unique to the practice
 - b. Procedures manual may be used as a guide for new employees
 - c. Assign a mentor to respond to questions encountered by new employees
 6. Probation and evaluation (Figure 45-4)
 - a. Probation period usually 60–90 days
 - b. Evaluation process
 7. Supervising student practicums
 - a. Opportunity for student to apply theory learned in classroom to practical, hands-on experience
 - b. Schedule information interview with extern before practicum starts
 - c. Discuss expectations
 - d. Tour of facility
 - e. Pretesting may be offered
 - f. Shadowing clinic manager
 - g. Supervise and evaluate practicum progress
 - h. Explain each step and provide rationales
 - i. Demonstrate techniques
 - j. Procedure 45-3: Supervising a Student Practicum
 - I. Employees with Chemical Dependencies or Emotional Problems
 1. Should be treated as ill
 2. Approach constructively
 3. Must not endanger self or anyone else
 - J. Evaluating Employees and Planning Salary Review
 1. Performance evaluation (Figure 45-5)
 - a. Not less than once per year
 - b. Formal or informal
 - c. One or more people
 - d. Self-evaluation

- e. Same form used by employee
- f. Climate of evaluation (Figure 45-6)
- g. Handling negative performance
- h. Closing
- 2. Salary review
 - a. Separate from performance evaluation
 - b. May have to be raised by employee
 - c. Collect data prior to review by networking
 - d. Factors determining salary increases
 - (1) Shortage of health care workers
 - (2) Salary should match education
- K. Dismissing Employees
 - 1. Use written performance evaluation as a guideline
 - 2. Involuntary dismissal
 - a. Because of poor performance
 - b. Because of serious violation of clinic policies or job descriptions
 - c. Should be brought up in review first
 - d. Verbal and written warnings
 - 3. Voluntary dismissal
 - a. Relocation
 - b. Seeking advancement
 - c. Personal reasons
 - d. Give proper notice
- L. Procedure Manual
 - 1. Provides detailed information relative to performance of tasks
 - 2. Designed for a particular clinic
 - 3. Serves as employee guide
 - 4. Can be useful in evaluating employee performance
 - 5. Accessible to all managers
 - 6. Organization of the Procedure Manual (Figure 45-7)
 - a. Loose-leaf binder
 - b. Divisions
 - c. Consistent format
 - d. Step-by-step procedures
 - e. Procedure 45-4: Developing and Maintaining a Procedure Manual
 - 7. Updating and Reviewing the Procedure Manual
 - a. Add new procedures
 - b. Annual page-by-page review
 - c. HIPAA implications
 - d. Date revisions
- M. Travel Arrangements
 - 1. Clinic manager may make travel arrangements for provider for conventions/seminars
 - 2. Carefully complete registration form
 - 3. Make hotel arrangements
 - 4. Keep general information regarding provider's preferences on record
 - 5. Contact travel agent to coordinate travel arrangements
 - 6. Acquire confirmation numbers for hotel and car rental
 - 7. May use Internet to search for lowest fares and reservations
 - 8. Procedure 45-5: Making Travel Arrangements with a Travel Agent and Procedure 45-6: Making Travel Arrangements via the Internet
 - 9. Itinerary (Figure 45-8)
 - a. A detailed plan for proposed trip
 - b. Includes all important information, e.g., air travel, car rental, hotel/motel, meeting location
- N. Time Management
 - 1. Disciplined to work well independently as well as with others
 - 2. Specific goals pinpointed
 - 3. "To do" list
 - 4. Handle each paper only once

5. Bring closure to telephone calls
6. DO NOT procrastinate
- O. Marketing Functions (Figure 45-9)
 1. Seminars
 2. Brochures (Figure 45-10)
 - a. Patient education brochures
 - b. Clinic brochures
 3. Newsletters
 4. Press Releases
 5. Special Events
 6. Social Media in the Medical Clinic
 - a. Webinar
 - b. Social Networking
 - c. Blogs
 - d. Social photo and video sharing
 - e. Wikis
 - f. Uses in the medical clinic
 - g. Appropriateness in the medical clinic
- P. Records and Financial Management
 1. Records and financial data handled by clinic manager
 - a. Daily payments (mail/clinic visits)
 - b. Clinic expenses
 - c. Social security records, withholding allowance certificates, employment eligibility verification forms, state and local tax records
 2. Electronic health records
 - a. Table 45-2: Clinic manager actions in response to TPMS data
 3. Payroll Processing
 4. Various forms
 - (1) W-4 Withholding exemption certificate (Figure 45-11)
 - (2) W-2 Wage and tax statement (Figure 45-12)
 - (a) Preparing payroll checks
 - (b) Procedure 45-7: Processing Employee Payroll
 5. Figuring employee taxes
 6. Managing benefits and other responsibilities
- Q. Facility and Equipment Management
 1. Safety factors
 2. Ancillary services
 - a. Ancillary services must not have access to confidential material
 3. Magazine subscriptions and health-related literature for reception area
 4. Building repairs and decorating
 5. Administrative and Clinical Inventory of Supplies and Equipment
 - a. Inventory methods
 - b. Cost containment considerations
 - c. Unpacking an order procedure
 - d. Warranty processing
 - e. Procedure 45-8: Perform an Inventory of Equipment and Supplies
 6. Calibration information
 - a. Procedure 45-9: Perform Routine Maintenance and
 - b. Calibration of Clinical Equipment
- R. Liability Coverage and Bonding
 1. Negligence
 2. Liability
 3. Malpractice
 4. “Going bare”
 5. Professional liability insurance
 6. Bonding
- S. Legal Issues

X. APPLICATION

- A. Use Learning Outcomes at the beginning of Chapter 45 in the text as the basis for questions to assess comprehension.
- B. See the Classroom Activities section below for numerous application activities.
- C. Assign students to complete Chapter 45 in the Study Guide.
- D. Complete the Procedures in Chapter 45, using the Competency Manual to evaluate.

IX. EVALUATION

- A. Evaluate any assigned application activities.
- B. Evaluate student participation during presentation.
- C. Grade responses to Chapter 45 in the Study Guide.
- D. Evaluate student performance on Chapter 45 Procedures.

Classroom Activities

1. Establish classroom as an ambulatory care setting. Have students role-play, taking turns as the clinic manager. Provide various scenarios for students to demonstrate, such as calling staff meetings and updating the procedures manual.
2. Have small groups of students review sample procedures manuals from an ambulatory care setting.
3. Assign students to create class newsletters, brochures, and press releases related to what you are doing in the class.
4. Establish a social media page for a mock ambulatory care setting.
5. Assign students to create guidelines for using social media for their mock ambulatory care clinic.
6. Call a staff meeting. Follow procedures as outlined in this chapter. Give sample notice, provide an agenda, and act as the clinic manager to model leadership and the use of basic parliamentary procedure.
7. Obtain a copy of *Robert's Rules of Order* or *Parliamentary Procedure at a Glance*. Practice following these procedures in class for a week.
8. Introduce a problem pertinent to the medical clinic. Work with students to develop teamwork solutions.
9. Develop conflict resolution scenarios and have students role-play resolution techniques.
10. Invite an ambulatory care clinic manager to speak to the class on any of the topics related to the medical assistant as clinic manager.
11. Have students inventory clinical and laboratory supplies. They may need to develop a form containing a list of items for easy check-off.
12. Have students go online to investigate HIPAA implications more thoroughly. Web sites such as <http://www.cms.hhs.gov> are excellent.
13. Additional Critical Thinking boxes are sprinkled throughout the chapter that may be used to promote discussion of specific topics pertinent to the chapter content.
14. Explore the Case Studies provided in this chapter for additional discussion and enhancement of principles pertinent to the chapter content.

Answers to Critical Thinking Boxes

How does the clinic manager begin to develop good working relationships with other community service organizations to better serve and provide for the patient's health care needs? How would this improve the quality of public relations?

- Network to learn what each community service has to offer and procedures for putting things into place.
- Create a notebook with community services listed by name, telephone number, and contact person.
- Be professional and respectful of each community service.
- Telephone and introduce yourself and inquire about the community service.

How would you make the medical clinic (front- and back-office space) safe for employees and nonemployees (e.g., patients, vendors, visitors)? List as many considerations as possible.

Answers will vary but may want to consider the following:

- Good lighting
- Electrical cords not frayed or a tripping hazard
- Window-blind cords not a choking hazard for small children
- Smoke and fire alarms in good working order
- HIPAA compliance in place

Answers to Case Studies

Case Study 45-1

Review the scenario at the beginning of the chapter.

Drs. Lewis and King have requested sigmoidoscopy procedures to be scheduled for two different patients. The patients are scheduled. Both patients are put on a strict diet and pretest protocol for several days to prepare for the procedures. The day of the appointments, Marilyn Johnson, CMA (AAMA) and clinic manager discovers that the two-sigmoidoscopy procedures have been scheduled at the same time. The problem is that the clinic has only one sigmoidoscope available.

1. Divide the class into two groups to discuss problem-solving solutions. Assume that rescheduling a patient is not an acceptable solution because of the patient's pretest protocol. The patients would be upset if the procedure could not be performed due to a scheduling problem.

Answers will vary, but the groups should discuss and incorporate the teamwork approach to plan and implement a solution.

2. How could this problem have been avoided?

The team previously should have identified the resources available and met to brainstorm possible problems that could occur and what their solutions might be.

3. Both patients have been told about the scheduling problem and one is upset and argumentative. What role should the clinic manager assume in this predicament?

The clinic manager should remain calm and try to keep the argument from escalating. Other patients may be present as well and should not be disturbed. One of the duties of the clinic manager is to supervise personnel, so she would want to be supportive of the staff while being understanding of the patients.

Case Study 45-2

Anita Juarez, the clinic administrative medical assistant, speaks privately with Jane O'Hara, the clinic manager and the person responsible for personnel. Anita has a suspicious lump in her breast. She has seen both her internist and a surgeon for evaluation. Next week, she will have the lump removed, perhaps even a complete mastectomy. Anita is concerned about the time she will need to be away from the clinic.

1. Identify the first and immediate concerns to be addressed.

Address Anita's concerns about the surgery and possible outcome. Determine whether Anita has the support and help from family or friends that she will need. If not, Jane O'Hara would want to see if there is something she can do personally.

2. What action might be taken to help both Anita and the clinic manager address these concerns?

Examine the tasks Anita is responsible for in the clinic, and consider how these might be distributed to others for a short period of time. Consider hiring a temporary person while Anita is recovering. Assure Anita that she will have her job when she is ready to come back.

3. Is it helpful to plan for the best results, the worst results, or both?

Plan for both the best and the worst results to be sure that all the bases are covered. It is important that Anita know that she will not lose her job and that she will be welcomed back when she is ready.

Answers to Certification Review

1. c. understand and support the task
2. a. should address each agenda topic and include a brief summary of discussions, actions taken, name of each person making a motion, the exact wording of motions, and motion approval or defeat
3. d. they have much to learn
4. b. It assumes that the student is an employee who does not need to be introduced to patients.
5. c. provides detailed information relative to the performance of tasks within the health care facility
6. a. marketing
7. d. equipment and supplies maintenance
8. d. all of the above
9. b. to promote personal tweeting
10. d. should be generic so that any clinic could follow the procedures
11. a. operates on the premise that most workers cannot make a contribution without being directed
12. c. used as a platform for voice recognition software

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