Medical Assisting
Study Guide

Assessments:
8617 Clinical Medical Assistant
8624 Administrative Medical Assistant
8625 Phlebotomy Technician

Aligned with The American Medical Technologists (AMT) Registered Medical Assistant

Endorsed by:

Other logos and brand names are also mentioned.
Overview

This study guide is designed to help students prepare for the following Medical Assisting assessments: Clinical Medical Assistant, Administrative Medical Assistant, and Phlebotomy Technician. It not only includes information about the assessments, but also the skills standards upon which the assessments are based and test taking strategies. The assessments measure a student’s ability to apply knowledge of the skills necessary for success in the Medical Assisting field.

Each of the four sections in this guide provides useful information for students preparing the Medical Assisting assessments.

- CareerTech and Competency-Based Education: A Winning Combination
- Medical Assisting Assessments
  - Assessment Information
  - Standards and Test Content
  - Sample Questions
  - Abbreviations, Symbols, and Acronyms
- Strategies for Test Taking Success
- Notes

The Clinical Medical Assistant assessment is aligned with The American Medical Technologists (AMT) Registered Medical Assistant and endorsed by INTEGRIS Physicians Services. The Administrative Medical Assistant assessment is aligned with the AMT Administrative Specialist and endorsed by the INTEGRIS Physicians Services. The Phlebotomy Technician assessment is aligned with AMT Registered Phlebotomy Technician and endorsed by INTEGRIS Physicians Services.

American Medical Technologists (AMT) is a nationally and internationally recognized health certification agency. AMT certification examinations are developed, administered, and analyzed using industry standards and state-of-the-art methodologies. AMT is also one of the few health care certification organizations accredited by the National Commission for Certifying Agencies (NCCA).

www.americanmedtech.org

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www.integrisok.com

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CareerTech and Competency-Based Education: A Winning Combination

Competency-based education uses learning outcomes that emphasize both the application and creation of knowledge and the mastery of skills critical for success. In a competency-based education system, students advance upon mastery of competencies, which are measurable, transferable outcomes that empower students.

Career and technology education uses industry professionals and certification standards to identify the knowledge and skills needed to master an occupation. This input provides the foundation for development of curriculum, assessments and other instructional materials needed to prepare students for wealth-generating occupations and produce comprehensively trained, highly skilled employees demanded by the work force.

Tools for Success

CareerTech education relies on three basic instructional components to deliver competency-based instruction: skills standards, curriculum materials, and competency assessments.

Skills standards provide the foundation for competency-based instruction and outline the knowledge and skills that must be mastered in order to perform related jobs within an industry. Skills standards are aligned with national skills standards and/or industry certification requirements; therefore, a student trained to the skills standards is equally employable in local, state and national job markets.

Curriculum materials and textbooks contain information and activities that teach students the knowledge and skills outlined in the skills standards. In addition to complementing classroom instruction, curriculum resources include supplemental activities that enhance learning by providing opportunities to apply knowledge and demonstrate skills.

Certification Assessments test the student over material outlined in the skills standards and taught using the curriculum materials and textbooks. When used with classroom performance evaluations, certification assessments provide a means of measuring occupational readiness.

Each of these components satisfies a unique purpose in competency-based education and reinforces the knowledge and skills students need to gain employment and succeed on the job.

Measuring Success

Evaluation is an important component of competency-based education. Pre-training assessments measure the student’s existing knowledge prior to receiving instruction and ensure the student’s training builds upon this knowledge base. Formative assessments administered throughout the training process provide a means of continuously monitoring the student’s progress towards mastery.

Certification assessments provide a means of evaluating the student’s mastery of knowledge and skills. Coaching reports communicate assessment scores to students and provide a breakdown of assessment results by standard area. The coaching report also shows how well the student has mastered skills needed to perform major job functions and identifies areas of job responsibility that may require additional instruction and/or training.
What are the Medical Assisting assessments?

The Clinical Medical Assistant assessment, Administrative Medical Assistant assessment, and Phlebotomy Technician assessment are end-of-program assessments for students in Medical Assisting programs. The assessments provide an indication of student mastery of knowledge and concepts necessary for success in careers in this area.

How were the assessments developed?

The assessments were developed by the CareerTech Testing Center. The Clinical Medical Assistant assessment is aligned with AMT Registered Medical Assistant and endorsed by INTEGRIS Physicians Services. The Administrative Medical Assistant assessment is aligned with the AMT Administrative Specialist and endorsed by the INTEGRIS Physicians Services. The Phlebotomy Technician assessment is aligned with AMT Registered Phlebotomy Technician and endorsed by INTEGRIS Physicians Services. Items were developed and reviewed by a committee of subject matter experts.

What do the assessments cover?

Specifically, the test includes multiple-choice test items over the following areas:

**Clinical Medical Assistant (100 questions)**
- Display Professionalism 10%
- Apply Communication Skills 8%
- Perform Clinical Duties 61%
- Apply Legal, Ethical, and Confidentiality Concepts 11%
- Provide Patient Instruction 10%

**Administrative Medical Assistant (85 questions)**
- Medical Assisting Foundations 13%
- Basic Clinical Medical Office Assistanting 4%
- Medical Office Clerical Assisting 11%
- Medical Records Management 11%
- Health Care Insurance Processing, Coding, and Billing 17%
- Medical Office Financial Management 14%
- Medical Office Information Processing 8%
- Medical Office Management 22%
Phlebotomy Technician (75 questions)

Obtaining Blood Samples 41%
Specimen Collection and Processing 7%
Time Management and Assignment Organization 9%
Professional Communications 3%
Clerical Skills and Duties 5%
Safety Standards and Procedures 15%
Legal, Ethical, and Professional Considerations 9%
Terminology, Anatomy, and Physiology 11%

What are the benefits of using these assessments?

Students receive a certificate for each assessment that he/she passes. This certificate may be included in his/her portfolio and used to communicate the student’s mastery of the subject matter to potential employers.

When should the assessment be taken?

The CareerTech Testing Center recommends that students take the assessments as soon as possible after receiving all standards-related instruction, rather than waiting until the end of the school year.

Are the assessments timed?

No. However, most students finish the assessment within one hour.

What resources can students use on these assessments?

Students are allowed to use calculators and scratch paper on CTTC assessments; however, these items must be provided by the testing proctor and returned to the proctor before the student’s exam is submitted for scoring. Calculator apps on cell phones and other devices may not be used on these assessments.

What accommodations can be made for students with Individualized Education Plans (IEPs)?

Accommodations are allowed for students with an Individualized Education Plan. Examples of allowable accommodations include:

- Extended time — This assessment is not timed; therefore, students may take as much time as needed to finish. The assessment must be completed in one testing session.

- Readers — A reader may be used to read the assessment to a student who has been identified as needing this accommodation.

- Enlarged text — Students needing this accommodation can activate this feature by clicking the AA icon in the upper right corner of the screen.
What can students expect on Test Day?

All CTTC assessments are web-based and delivered exclusively by a proctor in the school’s assessment center. The proctor cannot be an instructor or anyone who was involved with the student during instruction.

Assessments are delivered in a question-by-question format. When a question is presented, the student can select a response or leave the question unanswered and advance to the next question. Students may also flag questions to revisit before the test is scored. All questions must be answered before the test can be submitted for scoring.

After the assessment is scored, the student will receive a score report that not only shows the student’s score on the assessment, but also how the student performed in each standard area.

Can students retake the test?

Students may retake the test unless their school or state testing policies prohibit retesting. Students who can retest must wait at least three days between test attempts.
Standards and Test Content
Clinical Medical Assistant

Display Professionalism (10 questions)

1. Project a positive attitude
   • Anticipate and respond to the needs of others
   • Display a sincere interest in providing appropriate information
   • Enforce positive perceptions and overcome negative perceptions
   • Act as a role model for holistic health
   • Display a professional image and dress
     ‣ Business dress, posture, personal habits, gestures
     ‣ Hygiene (hair, cleanliness, make-up)
     ‣ Etiquette (table manners, gum, handshakes, introductions, etc.)

2. Demonstrate ethical behavior

3. Practice within the scope of education, training and personal capabilities
   • Determine personal capabilities and performance limitations
   • Recognize and function within personal limitations

4. Maintain Confidentiality
   • Maintain confidentiality of verbal, written, and computer information

5. Work as a team member
   • Display awareness of own and other team members’ responsibilities (physicians, other office staff)
   • Interact with others in a supportive manner
   • Practice the techniques of successful group dynamics and team building
   • Knowledge of work process (how to recognize what and why other staff need information)

6. Conduct oneself in a courteous and diplomatic manner
   • Interact with others in a polite, cordial manner
   • Abide by geographic and cultural customs of courtesy
   • Use communication techniques such as non-aggressive language and active listening

7. Adapt to change
   • Assess the type of conflict that is occurring
   • Confront the issues and people involved to resolve the conflict
   • Apply problem solving skills to:
     ‣ Prioritize needs
     ‣ Adapt schedules
     ‣ Reassign duties
     ‣ Modify activities
     ‣ Revise procedures
8. Show initiative and responsibility

- Attend work regularly and arrive on time
- Perform tasks properly, completely, and accurately
- Accept responsibility for own actions; admit errors and assist in corrections
- Recognize the work to be done and offer assistance
- Volunteer for additional duties as time allows
- Set and achieve self-development goals
  - Educational needs
  - Professional goals
  - Personal goals
- Recognize community organizations

9. Promote the Profession

- Maintain and encourage professional membership at the local, state, and national level (American Association of Medical Assistants, Professional Secretaries International, Vocational Student Organizations)
- Participate in professional meetings, seminars, workshops, and community events
  - Attendance
  - Sponsorship
  - Presentations
- Project the concept of the professional medical assistant

10. Apply critical thinking skills to workplace situations

- Utilize quality performance processes
- Utilize tools to analyze information
  - Basic statistical concepts and analysis, create charts, histograms, flow charts, quality tools

11. Manage stress

- Identify factors that cause stress
- In-house and outside resources
- Basic ways to reduce stress (diet, exercise)
- Separating home and work stress

Apply Communication Skills (8 questions)

1. Listen and observe

- Use listening and understanding techniques to determine key ideas for each of the following
  - Patients
  - Family members
  - Team members
  - Business Contacts
  - Observe to identify needs of others

2. Treat all patients with empathy and impartiality

- Display empathetic behavior in patient relationships
  - Identify verbal and nonverbal cues that express feelings, emotions, and needs
  - Interact with patients in such a manner as to encourage them to express feelings, emotions, and needs
• Display impartial behavior
  › Identify personal bias and prejudice
  › Recognize and respond appropriately to cultural differences

3. Adapt communication to individual’s abilities to understand
• Identify patients with special needs
• Use appropriate responses to communicate with patients with special needs

4. Recognize and respond to verbal and nonverbal communication
• Select appropriate response to verbal messages
• Select appropriate response to nonverbal messages by
  › Giving support through positive body language
  › Exhibiting active listening skills
  › Overcoming obstacles to nonverbal communication

5. Serve as liaison between physician and others
• Identify the professional roles of allied health care providers
• Recognize professional licensure/certification credentials
• Respond in professional situations in a manner that enhances the stature of the physician/employer

6. Evaluate understanding of communication
• Determine if the receiver understood intent and content of the communications by:
  › Practicing active listening
  › Paraphrasing statements
  › Questioning for clear interpretation
  › Observing responses

7. Receive, organize, prioritize, and transmit information
• In person
• By mail
• By Fax
• By computer (i.e., electronic mail, Internet)
• Utilize appropriate confidentiality release and transmittal procedures (including HIPAA Privacy Rule)
• Organize and prioritize incoming information

8. Use proper telephone technique
• Project positive telephone image
• Handle incoming telephone calls as follows:
  › Receive incoming calls
  › Screen incoming calls
  › Transfer incoming calls when indicated
  › Manage multiple incoming calls
  › Utilize telephone log or computerized system
• Handle the following telephone calls:
  › Appointments for patients
  › Inquiries about bills
  › Requests about fees
  › Satisfactory progress reports from patients or family members
  › Routine reports from hospitals and other sources
  › Office administration matters
• Handle telephone calls involving special problems
  ‣ Unidentified callers
  ‣ Angry callers
  ‣ Calls from family and friends
  ‣ Callers who will not end the call
• Handle telephone calls involving medical emergencies
• Record and deliver accurate telephone message
• Organize and place outgoing telephone calls
  ‣ Local
  ‣ Long distance
  ‣ Conference
• Utilize special features, if available
• Identify factors that relate to a global business environment
  ‣ Time zones
  ‣ Mailing
  ‣ International dialing codes
• Use telephone directories
  ‣ Directory—types and organization
  ‣ Telephone assistance and information
  ‣ Company directory maintenance

9. Interview effectively
• Patient by telephone
• Patient in office
• Family member in office
• Supplier/pharmaceutical representative

10. Use medical terminology appropriately
• Build and define medical terms
• Select and use appropriate terminology in the following:
  ‣ Transcription
  ‣ Reports
  ‣ Records and documents
  ‣ Patient education
  ‣ Correspondence
• Utilize technical references to verify accuracy
  ‣ Spelling

11. Compose written communication using correct grammar, spelling, and format
• Select and use appropriate format for written communication
• Use reference materials
  ‣ Dictionary
  ‣ Thesaurus
  ‣ Secretarial reference manuals
  ‣ Gregg’s Reference Manual
  ‣ Software/hardware documentation
  ‣ Microsoft Office Spell Check
Perform Clinical Duties (62 questions)

1. Apply principles of aseptic technique
   - Perform medical aseptic procedures
     - Handwashing
     - Sanitize instruments
   - Perform surgical aseptic procedures
     - Wrap and autoclave an article
     - Perform a surgical scrub
     - Utilize transfer forceps
     - Open a sterile pack
     - Set up a sterile tray
   - Chemical disinfection of articles
   - Work environment

2. Apply principles of infection control
   - Orientation and documentation of blood-borne pathogens
   - Process all specimens in a manner that eliminates or reduces the transmission of disease
   - Maintain an environment that eliminates or reduces transmission of disease
   - Dispose of specimens and equipment in accordance with federal, state, and local guidelines (CDC, OSHA)

3. Take vital signs
   - Body temperature
     - Take and record oral temperature
     - Take and record axillary temperature
     - Take and record rectal temperature
   - Pulse
     - Take and record radial pulse
     - Take and record apical pulse
   - Respiration
     - Take and record respiration
   - Blood pressure
     - Take and record blood pressure

4. Recognize emergencies
   - Distinguish between emergency and non-emergency situations
   - Apply assessment techniques to:
     - Perform telephone assessment
     - Perform visual assessment
     - Prepare for an emergency

5. Perform first-aid and CPR
   - Administer first-aid
     - Control bleeding
     - Apply bandages
     - Treat for shock
     - Immobilize fractures
     - Treat syncope
     - Treat central nervous system injuries and disorders
• Administer CPR
  ▪ Remove airway obstructions
  ▪ Administer artificial ventilation
  ▪ Administer chest compressions
  ▪ Perform abdominal thrust on a conscious adult, child, or infant when choking

6. Prepare and maintain examination and treatment area
   • Ensure cleanliness
   • Check equipment for proper working order and safety
   • Assemble equipment for examination/treatment
   • Remove used items from examination/treatment room
   • Restock supplies in examination/treatment area
   • Observe safety precautions

7. Interview and take patient history
   • Complete a patient history
   • Interview the patient to obtain patient history data
   • Record patient history

8. Prepare patients for procedures
   • Instruct patients in preparation for examinations and procedures
     ▪ Routine physical exams
     ▪ Specialty exams
   • Position and drape patient in the following positions:
     ▪ Horizontal recumbent
     ▪ Dorsal recumbent
     ▪ Sim’s
     ▪ Knee-chest
     ▪ Dorsal lithotomy
   • Prepare and/or secure patient’s written consent as required
   • Instruct and inform patients in preparation for procedures and examinations
   • Apply principles of radiation safety if assisting with radiographic procedures
     ▪ Wear dosimetry badge
     ▪ Protect patient from undue exposure
   • Provide post-procedure instructions

9. Assist physician with examinations and treatments
   • Explain procedures to patient
   • Prepare supplies for procedures and treatments
   • Assist physician with examinations and treatments
     ▪ Anticipate needs of physician
     ▪ Chart procedures
     ▪ Provide patient with instructions
     ▪ Clean examination/treatment room
10. Use quality control
   • Use quality control principles during:
     ▪ Patient preparation
     ▪ Specimen collection and handling
     ▪ Reagent management
     ▪ Prepare/maintain quality control log book
       ▪ Record quality control data
   • Instrument calibration
   • Laboratory testing
   • Diagnostic testing
   • Maintain records of quality control data

11. Collect and process specimens
   • Complete a laboratory request form
   • Instruct patient in specimen collection
   • Prepare equipment/supplies for collection
   • Collect and label biological specimen
     ▪ Blood
     ▪ Venipuncture
     ▪ Capillary puncture
       ▪ Urine
       ▪ Clean catch
       ▪ Timed
       ▪ Random
       ▪ Midstream
       ▪ Stool
       ▪ Sputum
     ▪ Process specimens after collection
     ▪ Prepare/fix specimen for examination
   • Throat culture
   • Vaginal
   • Deliver specimens for laboratory testing
   • Dispose of specimens and collection equipment

12. Perform selected tests that assist with diagnosis and treatment
   • Perform a routine urinalysis and record results
     ▪ Physical
     ▪ Chemical
   • Perform hematologic tests and record results
     ▪ Hematocrit
     ▪ Hemoglobin
     ▪ RBC
     ▪ WBC
     ▪ Platelet count
       ▪ Differential white blood cell count
   • Perform blood chemistry testing and record results
     ▪ Glucose (FBS, GTT)
     ▪ BUN
     ▪ Cholesterol
     ▪ Triglycerides
13. Perform immunological tests and record results
   • Mono tests
   • Strep screen
   • Rh factor
   • Pregnancy tests
   • Allergy scratch tests

14. Perform microbiological tests and record results
   • Streptococcal testing
   • Urine culture
   • Wound culture
   • Vaginal cultures
   • Gram staining
   • Sensitivity testing
   • Sensitivity testing

15. Perform tuberculosis screen and record results
   • Tine
   • Mantoux

16. Run an electrocardiogram and record results
   • 12-lead
   • Rhythm strip

17. Perform vision testing and record results
   • Distance visual acuity
   • Near visual acuity
   • Color blindness

18. Screen and follow up patient test results
   • Alert physician/supervisor of abnormal test results
   • Upon physician’s orders:
     • Discuss test results with patient
     • Instruct patient on diet modification
     • Instruct patient on drug dosage modification
     • Schedule patient for:
       — Hospitalization
       — Surgery
       — Return office visit
       — Other physicians
       — Physical therapy
       — Other treatments

19. Prepare and administer medications as directed by physician
   • Select the proper medication to administer
   • Calculate a drug dosage
   • Prepare the medication
     • Transfer oral medication to medicine cup
     • Reconstitute a powdered drug
     • Withdraw parenteral medication for an ampule
     • Withdraw parenteral medication from a vial
     • Prepare a unit-dose cartridge syringe
   • Administer medication and record the procedure
     • Oral solid medication
     • Oral liquid medication
     • Intradermal injection
     • Subcutaneous injection
     • Intramuscular injection
     • Topical medication
     • Eye drops
     • Ear drops
20. Maintain medication records
   • Record medication given
   • Write a prescription for physician signature
   • Maintain a controlled substance log book
21. Utilize proper body mechanics
22. Apply basic math to medically related problems
   • Patient weight
   • Add, subtract, multiply, divide.
   • Compute cost of supplies used (student used 4 foley catheters and they cost X each – so compute patient charges)
   • Inventory/supply problem (Suzanne knows of problem-in Keir Med Asst test)
   • Compute cost of day in a health care facility
23. Interpret diagrams, charts, graphs, and tables
   • Table of conversions
   • Temperature or weight graphs
   • X/y growth charts
   • Rule of nines
   • Household-metric-apothecary equivalents (table)
24. Convert household, apothecary and metric measures
25. Use formulas and equations to solve health-related math problems.
   • Metric to U.S. and U.S. to metric; ratio and proportions
   • Solving for X (prep for dosage calculations)
26. Transfer and transport patients with or without assistive devices using proper body mechanics
   • Operate wheelchair
   • Assist clients/patients with ambulation. (crutches, canes, walkers, and gait belts)
   • Provide transfer assistance to patients/clients
   • Wheelchair, chair, bedside commode, stretcher, bed

Apply Legal, Ethical, and Confidentiality Concepts (11 questions)

1. Document accurately
   • Accurately document medical information
   • Appropriately correct medical information entries
2. Determine needs for documentation and reporting
   • Identify sources of information for medicolegal documentation requirements in given locality
   • Observe local, state, and federal guidelines for statutory reports
   • Abide by reporting/documentation procedures for DEA
   • Fulfill IRS guidelines for reports and documentation
   • Obtain employment guidelines from appropriate agency and comply
   • Document medical records and complete incident report promptly for all personal injury occurrences
   • Comply with workers’ compensation reporting requirements
   • Document all activity related to patient care in the medical record
3. Use appropriate guidelines when releasing records or information
   • Protect privacy and confidentiality of patient health information
   • Release information in accordance with federal and state regulations
     ‣ Basic right to privacy
     ‣ Drug and alcohol rehabilitation records
     ‣ Public health and welfare disclosures
     ‣ Rights of minors
     ‣ HIV-related issues
     ‣ Subpoena duces tecum/depositions/court orders
   • Release information in response to written patient authorization
   • Honor a patient request to rescind an authorization to release information

4. Follow established policy in initiating, withdrawing, withholding, or terminating medical treatment
   • Health care provider/physician/patient contract (offer, acceptance, consideration)
   • Knowledge of the elements to be included in a letter of withdrawal
   • Certified mail and return receipt
   • Advance directives/Do Not Resuscitate
   • Organ donations

5. Dispose of controlled substances in compliance with government regulations
   • Identify controlled substances and their schedules
   • Comply with DEA regulations

6. Maintain licenses and accreditation

7. Monitor legislation related to current health care and practice

8. Perform within ethical boundaries
   • Apply ethical standards in the workplace
   • Respect patient rights
   • Recognize practices which involve bioethical issues

**Provide Patient Instruction (9 questions)**

1. Orient patients of office policies and procedures
   • Provide maps or verbal instructions on location
   • Introduce office personnel
   • Provide written and verbal information on office policies
   • Answer questions within scope of training and education
   • Use patient education systems and literature

2. Instruct patients with special needs
   • Instruct and demonstrate routine procedures for monitoring body functions
   • Instruct and demonstrate safety procedures for home medical equipment
• Demonstrate care, use, and special equipment to patient
  ▪ Crutches
  ▪ Walker
  ▪ Cane
  ▪ Wheelchair
  ▪ Hearing aids
  ▪ Braces
  ▪ Splints
  ▪ Casts
  ▪ Slings
  ▪ Prosthetic appliances

• Provide written and verbal instructions on chronic disease conditions, as instructed by the physician

3. Teach patients methods of health promotion and disease prevention
• Provide verbal and written information about routine physical examinations and laboratory testing

4. Provide verbal and written information
• Nutrition and diet therapy
• Exercise and weight control
• Hygiene
• Sexually transmitted/communicable diseases and preventive measures
• Family planning
• Smoking cessation
• Alcohol/drug prevention and treatment
• Instruct and assist patients with performance of self breast examinations
• Refer patients to outside resources as instructed by the physician

5. Orient and train personnel
• Introduce office staff
• Orientation to facility
• Assisting in the completion of personnel documents
• Distribute job descriptions
• Assign work schedule
• Make daily work assignments
• Demonstrate use of procedure manuals for the office
• Demonstrate use of policy manuals for the office
• Demonstrate use of office equipment
• Provide information on CDC Universal precautions, OSHA and CLIA, HIPAA, and American Disabilities Act regulation
• Emergency preparedness plan
Standards and Test Content
Administrative

Medical Assisting Foundations (11 questions)

1. Medical terminology
   • Use and spell basic medical terms appropriately
   • Identify root words, prefixes, and suffixes
   • Define basic medical terms

2. Anatomy and physiology
   • Know basic structures and functions of body systems
   • Know various disorders of the body (diseases, conditions, syndromes)

3. Legal and ethical considerations
   • Apply principles of medical law and ethics to the health care setting
   • Recognize legal responsibilities of, and know scope of practice for the medical administrative specialist
   • Know basic laws pertaining to medical practice
   • Know and observe disclosure laws (patient privacy, minors, confidentiality, HIPPA)
   • Know the principles of medical ethics established by the AMA
   • Recognize unethical practices and identify ethical responses for situations in the medical office

4. Professionalism
   • Employ human relations skills appropriate to the health care setting
   • Display behaviors of a professional medical administrative specialist
   • Participate in appropriate continuing education

Basic Clinical Medical Office Assisting (3 questions)

1. Basic health history interview
   • Obtain preliminary health histories from patients

2. Basic charting
   • Chart patient information

3. Vital signs and measurements
   • Measure vital signs (temperature, pulse, respiration, and blood pressure)
   • Obtain other vital measurements (weight, height)

4. Asepsis in the medical office
   • Understand concepts of asepsis, sanitization, disinfection, and sterilization
   • Understand prevention of disease transmission
   • Observe standard precautions
5. Examination preparation
   • Prepare patients for clinical examinations

6. Medical office emergencies
   • Recognize and respond to medical emergencies
   • Employ First Aid and CPR appropriately
   • Report emergencies as required by law

7. Pharmacology
   • Understand basic pharmacological concepts and terminology

**Medical Office Clerical Assisting (9 questions)**

1. Appointment management and scheduling
   • Schedule and monitor patient and visitor appointments
   • Address cancellations and missed appointments
   • Prepare information for referrals and preauthorization
   • Arrange hospital admissions and surgery, and schedule patients for out-patient diagnostic tests
   • Manage recall system and file

2. Reception
   • Receive and process patients and visitors
   • Screen visitors and vendors requesting to see physician
   • Coordinate patient flow into examining rooms

3. Communication
   • Employ effective written and oral communication
   • Address and process incoming telephone calls from outside providers, pharmacies, and vendors
   • Employ appropriate telephone etiquette when screening patient calls and addressing office business
   • Recognize, and employ proper protocols for telephone emergencies
   • Format business documents and correspondence appropriately
   • Process incoming and outgoing mail

4. Patient information and community resources
   • Order and organize patient informational materials
   • Maintain list of community referral resources

**Medical Records Management (9 questions)**

1. Systems
   • Demonstrate knowledge of, and manage patient medical records systems
   • Manage documents and patient charts using paper methods
   • Manage documents and patient charts using computerized methods
2. Procedures

- File records alphabetically, numerically, by subject, and by color
- Employ rules of indexing
- Arrange contents of patient charts in appropriate order
- Document and file laboratory results and patient communication in charts
- Perform corrections and additions to records
- Store, protect, retain, and destroy records appropriately
- Transfer files
- Perform daily chart management
- Prepare charts for external review and audits

3. Confidentiality

- Observe and maintain confidentiality of records, charts, and test results
- Observe special regulations regarding the confidentiality of protected information

**Health Care Insurance Processing, Coding, and Billing (15 questions)**

1. Insurance processing

- Understand private/commercial health care insurance plans (PPO, HMO, traditional indemnity)
- Understand government health care insurance plans (Medicare, Medicaid, Veteran's Administration, CHAMPUS, Tricare, use of Advance Beneficiary Notices)
- Process patient claims using appropriate forms (including superbills) and time frames
- Process Workers’ Compensation/disability reports and forms
- Submit claims for third-party reimbursements including the use of electronic transmission methods

2. Coding

- Understand procedure and diagnosis coding
- Employ Current Procedural Terminology (CPT) and Evaluation and Management codes appropriately
- Employ International Classification of Diseases 10 (ICD-10) codes appropriately
- Employ Health Care Financing Administration Common Procedure Coding System (HCPCS) codes appropriately

3. Insurance billing and finances

- Understand health care insurance terminology (deductible, copayment, preauthorization, capitation, coinsurance)
- Understand billing requirements for health care insurance plans
- Process insurance payments
- Track unpaid claims, and file and track appeals
- Understand fraud and abuse regulations
Medical Office Financial Management (12 questions)

1. Fundamental financial management
   • Understand basic principles of accounting
   • Perform bookkeeping procedures including balancing accounts
   • Perform financial computations
   • Manage accounts payable
   • Manage accounts receivable
   • Prepare monthly trial balance (reports)
   • Understand basic audit controls
   • Understand professional fee structures
   • Understand physician/practice owner compensation provisions
   • Understand credit arrangements
   • Manage other financial aspects of office management

2. Patient accounts
   • Manage patient accounts/ledgers
   • Manage patient billing (methods, cycle billing procedures)
   • Manage collections in compliance with state and federal regulations

3. Banking
   • Understand banking services and procedures (accounts, lines of credit, checking endorsements,
     deposits, reconciliation, and statements
   • Manage petty cash

4. Payroll
   • Prepare employee payroll and reports
   • Maintain payroll tax deduction procedures and records

Medical Office Information Processing (7 questions)

1. Fundamentals of computing
   • Possess fundamental knowledge of computing in the medical office including keyboarding, data
     entry, and retrieval
   • Possess fundamental knowledge of PC-based environment
   • Possess fundamental knowledge of word processing, spreadsheet, database, and presentation
     graphics applications
   • Employ procedures for ensuring the integrity and confidentiality of computer-stored information

2. Medical office computer applications
   • Employ medical office software applications
   • Use computer for billing and financial transactions
   • Employ e-mail applications
Medical Office Management (19 questions)

1. Office communications
   • Facilitate staff meetings and in-service, and ensure communication of essential information to staff

2. Business organization management
   • Manage medical office business functions
   • Manage office mailing and shipping services
   • Manage outside vendors and supplies
   • Manage contracts and relationships with associated health care providers
   • Comply with licensure and accreditation requirements

3. Human resources
   • Manage/supervise medical office staff
   • Conduct performance reviews and disciplinary action
   • Maintain office policy manual
   • Manage staff payroll and scheduling
   • Manage staff recruiting in compliance with state and federal laws
   • Orient and train new staff
   • Manage employee benefits

4. Safety
   • Maintain office safety, maintain office safety manual, and post emergency instructions
   • Observe emergency safety requirements
   • Maintain records of biohazardous waste, hazardous chemicals (Material Safety Data Sheets), and safety conditions
   • Comply with Occupational Safety and Health Act (OSHA) guidelines and regulations

5. Supplies and Equipment
   • Manage medical and office supply inventories and order supplies
   • Maintain office equipment and arrange for (and maintain records of) equipment maintenance and repair

6. Physical Office Plant
   • Maintain office facilities and environment

7. Risk Management and Quality Assurance
   • Understand and employ risk management and quality assurance concepts
Standards and Test Content
Phlebotomy

Obtaining Blood Samples (31 questions)

1. Identify correct patient properly
2. Select appropriate containers for specimens and know requirements for container identification
3. Know physiological aspects of blood collection
4. Prepare patient for various tests
5. Select proper venipuncture site
6. Perform venipunctures
7. Collect specimen in proper tube-draw sequence
8. Perform skin punctures
9. Perform heel punctures on infants
10. Provide proper post care of venous, arterial, and skin puncture sites
11. Handle blood samples to maintain specimen integrity
12. Label transfusion services (blood bank) specimens according to proper protocol

Specimen Collection and Processing (5 questions)

1. Properly handle non-blood specimens to maintain their integrity
2. Properly collect and handle specimens with time/temperature requirements
3. Properly collect and handle specimens for blood cultures
4. Select proper station for specimen delivery
5. Process specimens for shipping
6. Instruct patient in the collection of urine specimens
7. Instruct patient in the collection of other specimens
8. Collect and process point-of-care testing (POCT) specimens

Time Management and Assignment Organization (7 questions)

1. Read physician orders and requisitions
2. Set priorities for specimen collection
3. Schedule time intervals for tolerance tests
4. Schedule time intervals for drug-dependent tests
5. Refer problems to supervisor appropriately
6. Cooperate with co-workers in the completion of assignments
Professional Communications (2 questions)

1. Develop and use proper and professional communication skills with staff, patients, and families
2. Use proper technique and etiquette for answering the telephone
3. Inform patients of special test requirements

Clerical Skills and Duties (4 questions)

1. Chart or file laboratory-generated reports properly
2. Enter, retrieve, and verify patient collection data and special notations using appropriate sources
3. Maintain inventory levels, order, and restock supplies
4. Employ computer skills

Safety Standards and Procedures (11 questions)

1. Identify appropriate regulatory and standard-setting agencies
2. Know the use of material safety data sheets
3. Employ Universal/Standard precautions
4. Employ infection control and isolation techniques
5. Recognize patient problems related to syncope, nausea, and other complication

Legal, Ethical, and Professional Considerations (7 questions)

1. Know principles of liability regarding the practice of phlebotomy
2. Perform duties professionally, ethically, and legally, adhering to criminal justice and civil rights acts
3. Employ professional conduct and appearance in the performance of duties

Terminology, Anatomy, and Physiology (8 questions)

1. Employ basic terminology including suffixes, prefixes, and root words
2. Know basic anatomy
3. Know basic physiological systems
Sample Questions

1. In the medical assisting field, the acronym SOAP represents:
   a. subjective, objective, assessment, plan.
   b. subjective, onset, activity, plan.
   c. symptom, onset, assessment, plan
   d. symptom, objective, assessment, plan

2. Which of the following terms refers to a collection of fluid in the scrotal sac?
   a. balanitis
   b. epididymitis
   c. hydrocele
   d. prostatic hypertrophy

3. When notifying a client of a past due balance on a monthly statement, which classification of mailing should be used?
   a. certified
   b. first class
   c. priority
   d. registered

4. The presence of antibody B and antigen A on RBC results indicate which blood type?
   a. A
   b. B
   c. O
   d. AB

5. Nagele’s Rule is used to determine:
   a. blood count.
   b. expected due date.
   c. pediatric BMI.
   d. percentage of burns.

6. What is the correct order of parenteral routes from fastest to slowest absorption rate?
   a. IV, ID, SC, IM
   b. IV, IM, ID, SC
   c. IV, IM, SC, ID
   d. IV, SC, IM, ID
7. Who provides an interpreter for a patient who is hearing impaired?
   a. disability representative
   b. medical office
   c. patient
   d. SSI

8. When giving new employees instructions on taking emergency calls, instruct them to:
   a. answer questions within their scope of training.
   b. have the caller call 911 immediately.
   c. take the caller's name, number and a message; then talk to the doctor.
   d. use the procedure manual for phone triage.

9. The physician asks the medical assistant to convert 30 grains of medication into the metric system. Which of the following represents the correct conversion?
   a. 1 gram
   b. 1 ounce
   c. 2 drams
   d. 2 grams

10. At what point does the medical assistant check the shipping invoice after receiving new supplies?
    a. at the time of the receipt of merchandise
    b. monthly at a staff meeting
    c. once a week
    d. once a year when doing inventory
Sample Questions — Key

1. In the medical assisting field, the acronym SOAP represents:
   a. subjective, objective, assessment, plan.  Correct
   b. subjective, onset, activity, plan.  Incorrect
   c. symptom, onset, assessment, plan  Incorrect
   d. symptom, objective, assessment, plan  Incorrect

2. Which of the following terms refers to a collection of fluid in the scrotal sac?
   a. balanitis  Incorrect
   b. epididymitis  Incorrect
   c. hydrocele  Correct
   d. prostatic hypertrophy  Incorrect

3. When notifying a client of a past due balance on a monthly statement, which classification of mailing should be used?
   a. certified  Incorrect
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   c. O  Incorrect
   d. AB  Incorrect

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   a. blood count.  Incorrect
   b. expected due date.  Correct
   c. pediatric BMI.  Incorrect
   d. percentage of burns.  Incorrect

6. What is the correct order of parenteral routes from fastest to slowest absorption rate?
   a. IV, ID, SC, IM  Incorrect
   b. IV, IM, ID, SC  Incorrect
   c. IV, IM, SC, ID  Correct
   d. IV, SC, IM, ID  Incorrect
7. Who provides an interpreter for a patient who is hearing impaired?
   a. disability representative  Incorrect
   b. medical office  Correct
   c. patient  Incorrect
   d. SSI  Incorrect

8. When giving new employees instructions on taking emergency calls, instruct them to:
   a. answer questions within their scope of training.  Incorrect
   b. have the caller call 911 immediately.  Incorrect
   c. take the caller’s name, number and a message; then talk to the doctor.  Incorrect
   d. use the procedure manual for phone triage.  Correct

9. The physician asks the medical assistant to convert 30 grains of medication into the metric system. Which of the following represents the correct conversion?
   a. 1 gram  Incorrect
   b. 1 ounce  Incorrect
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    a. at the time of the receipt of merchandise  Correct
    b. monthly at a staff meeting  Incorrect
    c. once a week  Incorrect
    d. once a year when doing inventory  Incorrect
Abbreviations, Symbols and Acronyms

The following is a list of abbreviations, symbols, and acronyms used in the Medical Assisting study guide and on the Medical Assisting assessments.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>°</td>
<td>Degree</td>
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<td>'</td>
<td>Feet</td>
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<td>&quot;</td>
<td>Inches</td>
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<td>#</td>
<td>Number</td>
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<td>%</td>
<td>Percent</td>
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<tr>
<td>ACH</td>
<td>Automated Clearing House</td>
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<td>AMA</td>
<td>American Medical Association</td>
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<td>AMT</td>
<td>The American Medical Technologists</td>
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<tr>
<td>BMI</td>
<td>Body Mass Index</td>
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<td>BP</td>
<td>Blood pressure</td>
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<td>BSA</td>
<td>Body surface area</td>
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<td>BUN</td>
<td>Blood urea nitrogen</td>
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<tr>
<td>CBC</td>
<td>Complete blood count</td>
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<tr>
<td>cc</td>
<td>Cubic centimeter</td>
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<tr>
<td>CDC</td>
<td>Centers for Disease Control and Prevention</td>
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<tr>
<td>CD-ROM</td>
<td>Compact Disc Read-Only Memory</td>
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<tr>
<td>CEU</td>
<td>Continuing Education Unit</td>
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<tr>
<td>CHAMPVA</td>
<td>The Civilian Health and Medical Program of the Department of Veterans Affairs</td>
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<tr>
<td>CLIA</td>
<td>Clinical Laboratory Improvement Amendments</td>
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<tr>
<td>CME</td>
<td>Continuing Medical Education</td>
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<tr>
<td>CMS</td>
<td>Center for Medicare and Medicaid Services</td>
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<tr>
<td>CPR</td>
<td>Cardiopulmonary resuscitation</td>
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<tr>
<td>CPT</td>
<td>Current Procedural Terminology</td>
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<td>CT</td>
<td>Computed tomography</td>
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<td>CVA</td>
<td>Cerebral Vascular Accident</td>
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<tr>
<td>DEA</td>
<td>Drug Enforcement Administration</td>
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<tr>
<td>DRGs</td>
<td>Diagnosis-related group</td>
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<tr>
<td>EDC</td>
<td>Estimated date of confinement</td>
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<tr>
<td>EKG</td>
<td>Electrocardiogram</td>
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<td>EMR</td>
<td>Electronic Medical Record</td>
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<tr>
<td>FDIC</td>
<td>Federal Deposit Insurance Corporation</td>
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<td>FICA</td>
<td>Federal Insurance Contributions Act</td>
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<td>g</td>
<td>Gram</td>
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<td>gr</td>
<td>Grain</td>
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<tr>
<td>GTT</td>
<td>Glucose tolerance test</td>
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<tr>
<td>HCFA</td>
<td>Health Care Financing Administration</td>
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<tr>
<td>HCG</td>
<td>Human chorionic gonadotropin</td>
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<tr>
<td>HCPCS</td>
<td>Common Procedure Coding System</td>
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<td>HEENT</td>
<td>Head, Eye, Ear, Nose and Throat</td>
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<tr>
<td>HIPAA</td>
<td>Insurance Portability and Accounting Act</td>
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<tr>
<td>HIV</td>
<td>Human Immunodeficiency Virus</td>
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<td>hr</td>
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<tr>
<td>HMO</td>
<td>Health Maintenance Organization</td>
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<tr>
<td>Acronym</td>
<td>Full Form</td>
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<tr>
<td>ICD-10</td>
<td>International Classification of Diseases 10</td>
</tr>
<tr>
<td>ID</td>
<td>Identification</td>
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<td>ID</td>
<td>Intradermal</td>
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<tr>
<td>IEP</td>
<td>Individualized Education Plan</td>
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<tr>
<td>IM</td>
<td>Intramuscular</td>
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<tr>
<td>IRS</td>
<td>Internal Revenue Service</td>
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<tr>
<td>IV</td>
<td>Intravenous</td>
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<tr>
<td>kg</td>
<td>Kilogram</td>
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<tr>
<td>L</td>
<td>Liter</td>
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<tr>
<td>lbs</td>
<td>Pounds</td>
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<td>Mg</td>
<td>Milligram</td>
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<td>mL</td>
<td>Milliliter</td>
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<tr>
<td>MRSA</td>
<td>Methicillin-resistant Staphylococcus</td>
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<td>MSDS</td>
<td>Material Safety Data Sheets</td>
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<td>NCCA</td>
<td>National Commission for Certifying Agencies</td>
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<tr>
<td>NPO</td>
<td>Nothing by mouth</td>
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<td>oz</td>
<td>Ounce</td>
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<tr>
<td>PC</td>
<td>Personal Computer</td>
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<tr>
<td>PDR</td>
<td>Physician’s Procedural Terminology</td>
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<tr>
<td>PO</td>
<td>By mouth</td>
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<tr>
<td>POCT</td>
<td>Point-of-care testing</td>
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<td>PPO</td>
<td>Preferred Provider Organization</td>
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<tr>
<td>Prep</td>
<td>Prepare</td>
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<tr>
<td>PRN</td>
<td>As needed</td>
</tr>
<tr>
<td>q</td>
<td>Every day</td>
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<tr>
<td>RBC</td>
<td>Red blood cell</td>
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<tr>
<td>RBRVS</td>
<td>Resource-based relative value scale</td>
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<tr>
<td>SC</td>
<td>Subcutaneous</td>
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<tr>
<td>SSI</td>
<td>Supplemental Security Income</td>
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<tr>
<td>STAT</td>
<td>Sooner than already there</td>
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<tr>
<td>tbls</td>
<td>Tablespoon</td>
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<tr>
<td>tsp</td>
<td>Teaspoon</td>
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<tr>
<td>WBC</td>
<td>White blood cell</td>
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<tr>
<td>X-ray</td>
<td>X-radiation</td>
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</table>
Test Taking Strategies

This section of the study guide contains valuable information for testing success and provides a common-sense approach for preparing for and performing well on any test.

General Testing Advice

1. Get a good night’s rest the night before the test — eight hours of sleep is recommended.
2. Avoid junk food and “eat right” several days before the test.
3. Do not drink a lot or eat a large meal prior to testing.
4. Be confident in your knowledge and skills!
5. Relax and try to ignore distractions during the test.
6. Focus on the task at hand — taking the test and doing your best!
7. Listen carefully to the instructions provided by the exam proctor. If the instructions are not clear, ask for clarification.

Testing Tips

1. Read the entire question before attempting to answer it.
2. Try to answer the question before reading the choices. Then, read the choices to determine if one matches, or is similar, to your answer.
3. Do not change your answer unless you misread the question or are certain that your first answer is incorrect.
4. Answer questions you know first, so you can spend additional time on the more difficult questions.
5. Check to make sure you have answered every question before you submit the assessment for scoring — unanswered questions are marked incorrect.