SKILLS COMPETENCY ASSESSMENT
Answering Incoming Calls

Student's Name: _____ Date: _____

Objective: To answer telephone calls professionally, acquiring all necessary information from the caller, documenting it correctly, and properly acting on it.

Conditions: The student demonstrates the ability to answer incoming calls using the following equipment and supplies: telephone, telephone message pad, appointment calendar, and pen or pencil.

Skills Assessment Checklist:

Task Performed	Tasks
☐	Answers telephone promptly (no more than three rings).
☐	Answers with preferred office greeting.
☐	Asks name of caller as quickly as possible.
☐	Focuses on call.
☐	Expresses warmth and interest in tone of voices
☐	Is prepared with appropriate materials, such as notepad or appointment calendar.
☐	Uses notepad to record caller's name and phone line and notes on the content of the call if using a multi-line telephone system.
☐	Documents information on a message pad and/or the patient's chart as required and records appropriate future actions necessary.
☐	Repeats information back to the caller.
☐	Asks if caller has further questions.
☐	Ends the call courteously.
☐	Lets the caller hang up first before disconnecting.
☐	Completed the tasks within 10 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Handling Problem Calls

Student's Name: _____   Date: _____

Objective: To handle calls in a positive and professional manner while providing necessary comfort, empathy, and information
               to the caller to resolve the problem.
Conditions: The student demonstrates the ability to handle difficult calls using telephone, message pad, and pen or pencil.

Skills Assessment Checklist

**Task
Performed**   **Tasks**

☐   Remains calm and professional.

☐   Allows caller to finish speaking thoughts without interruption (unless it is a medical emergency required immediate
           attention).

☐   Listens to what the caller is upset about.

☐   Asks questions when appropriate during pauses

☐   Handles the situation objectively, without taking the caller's words personally.

☐   Offers assistance.

☐   Documents the call accurately and promptly.

           For a frightened or hysterical caller:

☐   Speaks in a soothing voice and s slower, lower tone than normal.

☐   If an emergency, begins triage procedures as needed.

☐   Has caller repeat back any instructions given.

☐   Finalizes and follows through on action to be taken.

☐   Reports problem calls immediately to physician or office manager.

           For an angry or a hostile caller:

☐   Lowers pitch and volume of voice.

☐   Uses the words I *understand* to express an interest in and empathy with the caller's concerns.

☐   Finalizes and follows through on action to be taken.

☐   Reports problem calls immediately to physician or office manager.

☐   If caller becomes abusive, politely but firmly tells caller the conversation must be ended and immediately terminates
           call.

☐   Completed the tasks within 15 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Placing Outgoing Calls

Student's Name: _____   Date: _____

Objective: To place outgoing calls efficiently and effectively.
Conditions: The student demonstrates the ability to place outgoing calls using telephone, message pad, pen or pencil, and any material specifically applicable to the call.

Skills Assessment Checklist

Task Performed | **Tasks**

☐   Prepares all appropriate materials, including telephone number, chart, financial information, appointment book, and notes of questions or information.

☐   Makes calls from quiet location.

☐   Rationale: Understands necessity of preserving patient confidentiality.

☐   Makes calls at a time when there is no interference with other office duties.

☐   Makes calls at appropriate time for the needs of the caller (e.g., considers time zones and business hours).

☐   Uses appropriate language, tone and communication techniques to ensure that the message is understood.

☐   Knows and follows legal guidelines for collection calls.

☐   Completed the tasks within 10 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Checking in Patients

Student's Name: _____   Date: _____

Objective: To ensure the patient is given prompt and proper care; to meet legal safeguards for documentation.
Conditions: The student demonstrates the ability to ensure the patient is given prompt and proper care and meets legal safeguards for documentation using the following equipment and supplies: patient chart, required forms and check-in list and/or appointment book.

Skills Assessment Checklist

Task Performed   **Tasks**

☐   Prepares a list of patients to be seen and assembles the charts the previous evening or in the morning before opening the ambulatory care setting.

☐   Checks charts to see that all information is up-to-date.

☐   Acknowledges patient immediately when she or he arrives.

☐   Checks the patient in and review vital information.

☐   Checks the patient's name off in appointment book and or day sheet with an ink pen.

☐   Asks politely for the patient to be seated and indicates the appropriate wait time.

☐   Places the chart where it will be used to route the patient to an appropriate location for the visit.

☐   Completed the tasks within 30 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Cancellation Procedures

Student's Name: _____   Date: _____

Objective: To protect the physician from legal complication; to free up care time for other patients; to ensure quality patient care.

Conditions: The student demonstrates the ability to implement cancellation procedures using the following equipment and supplies: appointment sheet, pen (red), and patient chart.

Skills Assessment Checklist

Task Performed	Tasks
☐	Develops a system so it is evident to staff making appointments that, owing to cancellations, time is now open to schedule other appointments.
☐	Changes: Indicates on the appointment sheet all appointments that were changed by noting changes in the appointment sheet margin and directly in the patient's chart, then indicating the new appointment time.
☐	Cancellations: Indicates cancellations on the appointment sheet and the patient chart. Draws a single red line through canceled appointments. Dates and initials notations in patient chart.
☐	No-shows: Indicates in the appointment book with a red X; notes in patient chart; dates and initials notation.
☐	Completed the tasks within 10 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESMENT
Establishing the appointment Matrix

Student's Name: _____   Date: _____

Objective: To have a current and accurate record of appointment times available for scheduling patient visits.
Conditions: The student demonstrates the ability to establish a current and accurate record of appointment times available for scheduling patient visits using the following equipment and supplies: appointment book, physician's schedule, staff schedule, and office calendar.

Skills Assessment Checklist

Task Performed	Tasks
☐	Blocks off times in the appointment book with patients are not to be scheduled by marking a large X through these time slots.
☐	Writes in all vacations, holidays, and other office closures as soon as they are known.
☐	Notes staff absences that might affect patient scheduling.
☐	Writes in all physician meetings, hospital rounds, appointments, conferences, vacations, and other prescheduled physician commitments.
☐	Color-codes with highlighter if the office has a scheduling system for certain examinations or procedures.
☐	Completed the tasks within 30 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Steps for Manual Filing with a Subject Filing System

Student's Name: _____   Date: _____

Objective: To demonstrate an understanding of the principles of the subject filing system.
Conditions: The student demonstrates the ability to understand the principles of a subject filing system using the following
                equipment and supplies: documents to be filed by subject, subject index list or index card file listing subjects,
                alphabetic card file and cards.

Skills Assessment Checklist

**Task
Performed**   **Tasks**

☐   Reviews the item to find the subject.

☐   Matches the subject of the item with an appropriate category on the subject index list.

☐   Decides on the proper cross-reference if the item contains information that may pertain to more than one subject.

☐   Underlines the subject title, if it appears on the material.

☐   If subject title is not on the material, writes the subject title clearly in the upper right hand corner and underline it.

☐   Uses and wavy line for cross-referencing and an X, as with alphabetic and numeric filing.

☐   Underlines the first indexing unit of the coded units.

☐   Completed the tasks within 10 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Preparation for Posting a Day sheet

Student's Name: _____   Date: _____

Objective: To ensure that the individual in charge of recording patient transactions is organized and prepared before patients arrive.

Conditions: The student demonstrates the ability to record patient transactions using the following equipment and supplies: pegboard, new charge slips and receipt forms, new day sheet, and ledger cards of patients scheduled for the day.

Skills Assessment Checklist

**Task
Performed**   **Tasks**

☐   Places a new day sheet and strip of charge slips on the pegboard.

☐   Fills in information at the top of the day sheet (date and page number).

☐   Carefully enters forwarded balances in Section 4, "Previous Page" columns A-D, and the "Previous Day's Total" and "Accts. Rec. 1st of Month" in the Accounts Receivable control and Accounts Receivable Proof boxes.

☐   Pulls ledger cards from the storage file for all scheduled patients and keeps them available in order in which the patients will be seen.

☐   Keeps a strip of receipt forms on hand in case someone comes into the office to make payment on account.

☐   Completed the tasks within 30 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT

Recording Charges and Payments Requiring a Charge Slip (Patient Visits)

Student's Name: _____   Date: _____

Objective:	To record information pertaining to a patient's visit to the physician on the patient's ledger and the day sheet and to provide a charge slip for insurance billing.
Conditions:	The student demonstrates the ability to record patient information using a patient ledger care and day sheet and to generate an insurance bill using a charge slip.

Skills Assessment Checklist

Task Performed   **Tasks**
When a patient comes in for an appointment

☐   Lines up the patient's ledger under the next charge slip and turns back the first two pages of the slip.

☐   Writes the date, name of patient, and name of responsible party.

☐   Writes any previous balance on the charge slip.

☐   Removes the charge slip from the pegboard and clips it to the front of the patient's chart to be given to the physician.

When the patient returns the form to the front desk

☐   Enters the charge next to each procedure and writes in the total on the front of the slip.

☐   Replaces the charge slip on the pegboard, carefully lining it up with the patient's name on the day sheet, and correctly inserts the ledger card under the last page of the charge slip.

☐   Turns back the first two pages for the charge slip and enters the total charge and any patient payments in the correct columns.

☐   Arrives a the final balance by looking at the column on the day sheet that shows the previous balance adding the day's charges and subtracting payments made.

If the day sheet has additional columns to the right of the charge slip

☐   Records receipts number, if appropriate.

☐   Records method of payment.

☐   Applies business analysis as outlined by office procedures.

To complete the procedure

☐   Completes the posting of each transaction all the way to the far right and on the same line of the day sheet as instructed by office procedures.

☐   Keeps first copy of charge slip for filing in patient's chart and gives other copies to patient: one for the patient's personal records and one for submission for insurance reimbursement.

☐   Completed the tasks within 10 minutes

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Receiving a Payment on Account Requiring a Receipt

Student's Name: _____   Date: _____

Objective:	To record payment on the day sheet and patient's ledger care and to provide a receipt to the patient.
Conditions:	Student demonstrates the ability to record a payment and provide receipts to patients using a day sheet, patient ledger card, and new receipt form.
Time Requirements and Accuracy Standards:	5 minutes. Points assigned reflect importance of step to meeting objective: Important = (5) Essential = (10) Critical = (15). Automatic failure results if any of the **critical** tasks are omitted or performed incorrectly.

Skills Assessment Checklist

Task Performed   **Tasks**
When someone comes into the office to make a payment

☐   Places receipt forms on the pegboard in place of the charge slips.

☐   Pulls the patient's ledger and places it under the receipt form with the first blank line of the ledger under the carbon strip.

☐   Enters the following information on the top of the receipt: date, reference description, payment, amount, and previous balance.

☐   Calculates the new balance by subtracting the payment amount from the previous balance.

☐   Gives the receipt to the person making the payment.

☐   Rationale: Can state reason why no copy of the receipt is needed for the office.

☐   Completed the tasks within 5 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Recording Payments Received Through the Mail

Student's Name: _____ Date: _____

Objective: To record payments received in the mail on the day sheet and patient ledger card, including payments received from patients and from insurance companies on patient's behalf.

Conditions: The student demonstrates the ability to record patient and insurance payments received in the mail using the day sheet and patient ledger cards.

Skills Assessment Checklist

**Task
Performed** **Tasks
If a patient mails in a payment or if a payment is sent by an insurance company**

☐ Pulls the appropriate ledger card and places it directly on the day sheet.

☐ Temporarily removes the strip of charge slips from the pegboard.

☐ Enters the patient's previous balance on the day sheet (ledger card does not extend to this column).

☐ Posts directly onto the ledger card the date, reference (patient name), description (ROA or ROA ins), and payment amount.

☐ Calculates the new balance by subtracting the payment amount from the previous balance.

☐ Completed the tasks within 5 minutes.

☐ Results obtained were accurate

SKILLS COMPETENCY ASSESSMENT
Balancing Day Sheets

Student's Name: _____   Date: _____

Objective: To verify that all entries to the day sheet are correct and that the totals balance.
Conditions: The student demonstrates the ability to verify day sheet entries and confirm that totals are in balance using the
                following equipment and supplies: day sheet and calculator.

Skills Assessment Checklist

Task
Performed   **Tasks**
                    Column totals

☐   Totals columns A, B1, B2, C, and D and enters the total for each column in the boxes marked "Totals This Page."

☐   Adds column totals to the figures entered in the "Previous Page" column boxes to arrive at the "Month-to-Date" totals.

Proof of posting (all figures are taken from the "Totals This Page" column boxes)

☐   Enters today's column D total, which shows the sum of all the previous balances entered when the transactions were posted.

☐   Enters column A total and adds column A and D totals to arrive at subtotal.

☐   Adds columns B1 and B2 to arrive at sum for total credits for the day. Enters total in space provided for "Less Cols. B1 and B2." Subtracts the total of credits from the subtotal listed in the previous box.

☐   Verifies that result equals the amount in column C to indicate that transactions are balanced.

☐   Rationale: Can state the posting process from an individual transaction to achieving a new balance.

Accounts Receivable (A/R) Proof

☐   Carries column A and column B totals from the "Proof of Posting" box to the corresponding spaces in the "A/R control" box.

☐   Adds the amount already entered in the "Previous Day's Total" space to the column A amount to arrive a subtotal.

☐   Subtracts the amount carried over from the "Less cols. LB1 and B2" Box to find the new "Accounts Receivable" amount.

Accounts Receivable Proof

☐   Enter the "Accounts Receivable" amount from the first working day of the month.

☐   Enters the column A "Month-to-Date" total where shown.

☐   Adds the column A amount to the "Accounts Receivable" amount from the first of the month and enters sum in the subtotal space.

☐   Enters the sum of column B1 B2 month-to-date amounts in the space provided and subtracts this sum from the subtotal. Enters amount in the "Total Accounts Receivable" space.

☐   Verifies that the total "Accounts Receivable" amounts in the "A/R Control and "A/R Proof" boxes match to confirm that posting is correct and the day is balanced.

Task Performed	Tasks
	Deposit verification
☐	Totals the columns in Section 2 of the day sheet and enters the sum of the columns in the space marked "Total Deposit."
☐	Verifies that the "Total Deposit" and the total payments received form column B1 are equal.
	Business analysis summary
☐	Totals each column in the summary section.
☐	If the summary is used to break out charges by type of by physician, verifies that the sum of the column equals the day's column A total.
☐	If the summary is used to credit payment to different physician, verifies that the sum of the columns equal the day's payment column.
	To transfer balances after the day sheet is balanced
☐	Takes out a new day sheet for the next day.
☐	Transfers the "Month-to-Date" column totals to the "Previous Page" column boxes on the new sheet.
☐	Enters the "Total Accounts Receivable" amount from the last day sheet in the "Previous Day's Total" space of the "A/R Control" box on the new day sheet.
☐	Enters the "Account Receivable 1st of the Month" amount in the "A/R Proof" box on the new sheet.
☐	Completed the tasks within 30 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Preparing and Composing Business Correspondence Using All Components

Student's Name: _____   Date: _____

Objective: To prepare and compose a rough draft and final-copy business letter.
Conditions: The student will demonstrate the ability to prepare and compose a rough draft and final-copy letter using appropriate language and letter style to convey a clear and accurate message to the recipient using the following equipment and supplies: computer or word processor and printer, or typewriter; printed letterhead and plain second sheet; dictionary; thesaurus; medical dictionary; style manual; index card.

Skills Assessment Checklist

Task Performed	Tasks
☐	List key point to be addressed and organized them.
☐	Organizes the index cards in a logical sequence, then composes a rough draft of the letter
☐	States the reason for the letter in the first paragraph and encourage action in the last paragraph.
☐	Proofreads the draft for grammar, spelling, and punctuation. Uses the appropriate reference material to check any inaccuracies.
☐	Chooses the letter format customary to the ambulatory care setting.
☐	Begins keying the letter referring to the chosen format. Enters complete date on line 15 or two to three lines below the letterhead.
☐	Keys the recipient's name and address flush with the left margin beginning on line 20.
☐	Keys the recipient's name and address flush with the left margin on the second line below the recipient's address. Follows salutation with a colon, unless using open punctuation.
☐	Keys the subject of the letter on the second line below the salutation flush with the left margin.
☐	Begins the body of the letter on the second line below the salutation or subject line. Uses correct letter style.
☐	Keys the complementary closure on the second line below the body of the letter, capitalizing only the first word.
☐	Keys the signature four to six lines below the complimentary closing.
☐	Keys reference initials, if used, two lines below the keyed signature.
☐	Keys the enclosure of carbon copy notation one or two lines below the reference initials.
☐	Proofreads the document and makes corrections as necessary.
☐	Prepares the envelope and attaches to the letter.
☐	Completed the tasks within 15 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Reconciling a Bank Statement

Student's Name: _____   Date: _____

Objective: To verify that the balance listed in the checkbook agrees with the balance shown by the bank.
Conditions: The student demonstrates the ability to reconcile a bank statement using a checkbook, bank statement, and calculator.

Skills Assessment Checklist

Task Performed	Tasks
☐	Checks that the balance in the checkbook is current.
☐	Subtracts any service charge listed on the statement from the last balance listed in the checkbook.
☐	In the checkbook, checks off each check listed on the statement and verifies the amount against the check stub.
☐	In the checkbook, checks off each deposit listed on the statement.
☐	Copies ending balance listed on the front of the bank statement in the space indicated on the worksheet found on the reverse side of the statement.
☐	Totals the checks not cleared on the bank statement worksheet.
☐	Totals the deposits not credited on the worksheet.
☐	Adds together the statement balance and the total of deposits not credited.
☐	Subtracts the total of checks not cleared.
☐	Verifies that this amount agrees with the balance in the checkbook.
☐	If checkbook balances, files statement in appropriate place.
☐	Completed the tasks within 30 minutes.
☐	Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT
Balancing Petty Cash

Student's Name: _____   Date: _____

Objective: To verify that the amount of petty cash is consistent with the beginning amount, less expenditures shown on receipts.

Conditions: The student demonstrates the ability to balance the petty cash amount using petty cash box, vouchers, and calculator.

Skills Assessment Checklist

**Task
Performed**   **Tasks**

☐   Counts the money remaining in the petty cash box.

☐   Totals amounts of all vouchers in the petty cash box.

☐   Subtracts the amount of receipts from the original amounts in petty cash. This amount should equal the amount of cash remaining in the box.

☐   After balancing, writes check only for the amount that was used, bringing petty cash back up to the original amount.

For petty cash check disbursement

☐   Sorts all vouchers by account.

☐   Lists accounts involved on a sheet of paper.

☐   Totals vouchers for each account and records individual totals on the list.

☐   Copies this list with its totals on the "Memo" portion of the stub for the check number on the list.

☐   Completed the tasks within 15 minutes.

☐   Results obtained were accurate.

SKILLS COMPETENCY ASSESSMENT

Preparing, Sending, and Receiving a Fax

Student's Name: _____   Date: _____

Objective: To send and receive information quickly and accurately by fax (facsimile).
Conditions: The student will demonstrate the ability to send and receive information quickly and accurately by fax using the
               following equipment and supplies: fax machine, telephone, correspondence, fax cover sheet.

Skills Assessment Checklist

**Task
Performed   Tasks
                   To Send a Fax**

☐   Prepares a cover sheet or uses a preprinted cover sheet for the document to be faxed. Includes on cover sheet the
                   addresses of sender and receiver, total number of faxed pages (including cover sheet), and short massage.

☐   Rationale: Understands that confidential information must be faxed only with the advance permission of the
                   receiver. The cover sheet must include a notice on confidentiality.

☐   Places the document face down in the fax machine.

☐   Dials the telephone or dedicated fax number of the receiver. Checks accuracy of number dialed.

☐   Requests a receipt or report after the document passes through the fax machine.

☐   Removes the documents from the machine; calls recipient to ensure that fax was received.

                   To Receive a Fax

☐   Ensures that the fax machine is turned on and that the telephone line to the machine is not being used.

☐   Removes the document from the machine after it is received.

☐   Immediately delivers the faxed document to the addressee.

☐   Completed the tasks within 10 minutes.

☐   Results obtained were accurate.