Chapter 12
Office Environment and Daily Operations
Lesson 12.1

Basic Office Duties and Procedures

- Define, spell, and pronounce the terms listed in the vocabulary.

- List five specific actions that must be taken to prepare for patients before the office opens in the morning.

- Explain why patient traffic flow is an important consideration in the office design.
Introduction

Medical assistants must be:

- Multitaskers and efficient
- Prepared for daily operations
- Flexible and able to adapt
- Patient-centered
The Office Policy and Procedures Manual

- Manual should be easy to read, detailed, and logically organized
- Provide administrative information and steps for every procedure performed in office
- Constantly updated document as technology and regulations change
- Reviewed annually in compliance with OSHA regulations
- Medical assistant must check office policy manual before a procedure to avoid error
Using the Office Policy Manual

- All employees should read manual
- Know expectations of supervisors
- Manual used as reference for all employees
- Whenever manual is revised, insert a page giving date revisions become effective
- After revision, a memo should go out detailing changes made
Sections of Office Policy Manual

- Expected employee performance
- Tardy and absentee policy
- Sexual harassment
- Confidentiality
- Vacations, sick time, and paid time off
Sections of Office Policy Manual, cont’d

- Employee evaluation
- Continuing education
- Chain of command
- How to deal with certain patients and visitors
Opening the Office

- Assume that office policy requires preparation in the morning
- Office policy should demand that supervisors be proactive in preventing theft
- A certain number of employees will have keys and will know alarm codes for facility
Preparing for the Day Ahead

- Divide preparation duties among staff
  - Collect any phone, fax, e-mail messages
  - Print two copies of day’s appointments: one for physician, one used to gather medical records
  - Check medical records to see if progress notes section has enough space for physician to write; if not, add sheets
  - Check for any lab or treatment results available
Preparing for the Day Ahead, cont’d

- Divide preparation duties among staff
  - Stock exam rooms with supplies
  - Check restrooms for supplies
  - Check that prescription pads are available for physician, but away from patient access
  - Turn on computers, lab equipment, copy machines, lights in exam rooms
  - Run any quality assurance tests on lab machines and record results
Visitors to the Office

- Check office policy manual for procedure in handling visitors
- Pharmaceutical reps should be treated with respect
  - They may or may not leave gift items according to state law
Budgeting

- Annual budget determines amount of money to be spent in various categories
Common Expenses of Medical Practices

- Salaries
- Medical supplies
- Business equipment
- Medical equipment
- Utilities
- Rent or mortgage
- Insurance
- Maintenance
- Taxes
- Laboratory fees
- Office supplies
Budgeting

- Generally budget a year in advance
- Expenses logged into ledger or spreadsheet by category
- Spend money wisely to stay within budget
Comparing Prices

- Compare prices when shopping for supplies and equipment
- Warranties, quality, bulk purchase opportunities, and maintenance agreements should also be considered
- Those who regularly use an item should be allowed to have purchase input
- Compare prices from at least three sources before ordering
Ordering Supplies

- Ordering responsibilities should be assigned to one person
- Develop a spreadsheet to list everything that needs to be ordered
- Post spreadsheet in supply area and have staff make a note when they take something out
- When time to order, collect spreadsheets, and use to guide ordering
Ordering Supplies: Other Methods

- Software program system: to prepare orders or enter products taken from supply area
- Sticker system: coded sticker is removed from used product and charged to patient
- Note card system: note card is prepared for each supply item, inventory is done, and orders based on note cards
Using the Internet

- Excellent prices and discounts found through online ordering
- Most physicians have accounts with suppliers and pay monthly
- Pay off credit cards monthly to avoid interest charges
Receiving an Order

- Notify person in charge of inventory when order arrives
- Only open boxes if enough time to check them in correctly
- Find packing slip and check order with packing slip; do not remove items until done
- Report discrepancies to supplier
- Stock items and rotate so that older items are used first
Closing the Office

- Check all patients have left
- Walk through all rooms to be sure they are empty and straighten rooms
- Secure patient records
- Place lab specimens for outside lockbox pick-up
Closing the Office, cont’d

- Perform general housekeeping duties
- Run accounting reports
- Balance day sheet
- Prepare bank deposit
- Turn over phones to answering service or voice mail
Closing Comments

- Perform daily tasks competently and dependably
- Patient is primary concern in office
- Medical assistant should make patients feel at ease and encouraged to follow physician’s treatment plan
- All office duties play a role in patients’ health and well-being
Legal and Ethical Issues

- Keep copies of all communications relating to patient care
- If handwritten, must be legible and easily read