

SAULT COLLEGE OF APPLIED ARTS AND TECHNOLOGY

SAULT STE. MARIE, ONTARIO



Sault College

COURSE OUTLINE

COURSE TITLE: Patient Management Systems

CODE NO. : CHA105 **SEMESTER:** 2

PROGRAM: Chiropractic Health Assistant

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DATE: Jan/01 **PREVIOUS OUTLINE DATED:** Jan/00

APPROVED:

DEAN

DATE

TOTAL CREDITS: 3

PREREQUISITE(S): CHA100, CHA101, MST101

LENGTH OF COURSE: 3 Hours/Week

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For additional information, please contact Judi Maundrell, Dean
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I. COURSE DESCRIPTION:

This course provides the student with essential knowledge and skills to manage a Chiropractic office on a daily basis. Patient management, billing procedures and computer operation of office procedures are the focus. Responsibilities associated with customer billing, accepting payments, regularly reconciling statements and assignment of insurance benefits to the Ontario Hospital Insurance Plan, private insurance companies and the Workers' Safety Insurance Board will be studied.

The student will learn to organize time, use effective and appropriate communication and interpersonal skills, identify methods of handling confidential information and describe the Chiropractic Health Assistant's role in the goals of the organization.

Areas to be studied include: making decisions, setting priorities, learning time management techniques, recording messages, keyboarding general office correspondence, reports, forms and tracking and managing information.

Through completion of office simulations, students will demonstrate proficiency with the following features of Patient Management software programs used in Chiropractic offices.

Eg: OCA: Patient Management Program

- Initiating a Patient Account
- Editing a Patient Account
- Scheduling Patient Appointments
- Merging Print Letters with Patient Data
- Direct Payment of Patient Accounts
- Accessing Custom Help Files for OHIP/WCB Codes

II. LEARNING OUTCOMES:

Upon successful completion of this course, the student will be able to:

Upon successful completion of this course, the student will demonstrate the ability to:

1. Demonstrate the roles of the Chiropractic Health Assistant within the business office setting.

Potential Elements of the Performance:

- a. identify and explain selected roles of the Chiropractic Health Assistant.
 - Time manager, patient manager
 - Financial record keeper
 - Office administrative assistant/manager
 - Filing clerk/receptionist/ambassador for Chiropractor
 - Liaison role with OCA, professionals in the community
 - PR personnel
 - Health teacher
 - Confidential record keeper

- Typist
 - Telephone personality
 - Inventory control clerk
 - Cashier, account manager
- b. Demonstrate positive ways each of the above roles may be carried out on a daily basis.
 - c. Identify what the ramifications are when these roles are not fulfilled or done poorly.
 - d. Demonstrate examples of etiquette required within the professional business office.
 - e. Discuss professional ethical guidelines which must be applied in the Chiropractor's office.
2. Use effective and appropriate communication skills for the business environment to assist in the completion of individual and team tasks and to promote the image of the organization.

Potential Elements of the Performance:

- a. Demonstrate use of effective communication skills in the following situations:
 - Making arrangements for cash payments for treatment.
 - Talking with a client in default of payments.
 - When unable to book a client for treatment as a "drop in".
 - When client proceeds to tell you health information in front of other clients.
 - When the office has clients waiting and you are making a telephone referral.
 - When client is in pain and unsure of future appointment.
 - When recording a voice message if the office is closed
 - When discussing a client's request for health information and others are in the waiting room.
 - b. Define the concept of "confidential information" as it relates to health and financial matters.
 - c. Discuss how confidential information needs to be handled and the ethical and legal implications.
3. Demonstrate competent skills in essential office procedures and computer management:
- | | |
|-----------------|---|
| System software | - for client management |
| | - to maintain financial records |
| | - to create and edit client files and accounts |
| | - for general office procedures and record keeping needs. |

Potential Elements of the Performance:

- a. Use OCA Patient Management Program software.
 - b. Demonstrate effective use of Patient Management Program to complete the following tasks:
 - Initiate a client account/record
 - Edit a client account/record
 - Schedule client appointments
 - Schedule meetings, luncheons, etc.
 - Develop useful forms, memos
 - Word processing business letters, reports referrals
 - Track inventory/supplies
 - Create, prepare, mail statements
 - Merge letters with client data
 - Access custom help files
 - c. Organize, process and respond to electronic and paper communications to facilitate the flow of information in the work place.
 - d. Use Patient Management Program effectively to maintain accurate and systematic client financial records and files.
 - e. Develop accurate daily sheets, summary monthly audits.
 - f. Complete bank deposit slips/bank reconciliation.
 - g. Demonstrate ability to bill through OHIP, WSIB, private insurance, direct client billing.
 - h. Demonstrate skill in maintaining financial records and files, complete receipts, reconcile statements.
4. Implement effective and appropriate time management techniques in the role of Chiropractic Health Assistant in both office and clinic environments.

Potential Elements of the Performance:

- a. Explain the concept of time management.
- b. Identify examples of appropriate time management techniques in work settings to-date.
- c. Provide specific examples of time wasters.
- d. List and begin to apply effective time management techniques with chiropractic environments.
- e. Determine ways to set priorities within the office and clinic setting.
- f. Review decision making patterns of behaviour and ways to determine who/when divisions are to be made.

III. TOPICS:

1. Role of the Chiropractic Health Assistant Within the Office Setting
2. Interpersonal Skills Associated with Billing, Finances, Booking Appointments, Health Matters
3. Office Procedures
4. Client Management
5. Maintaining Financial Records/Client Files
 - Preparing/Mailing Statements
 - Making Financial Arrangements with Patients
 - Procedure for Billing
 - Reconciliation with OHIP
 - WSIB
 - Private Insurance
 - Collection of Payments
 - Bank Reconciliation
6. OCA Patient Management System Software Program
7. Time Management

IV REQUIRED RESOURCES/TEXTS/MATERIALS:

O.C.A. (1999). Patient Management Program, User Guide. Toronto: Ontario Chiropractic Association.

Reference Resources/Texts/Materials:

Schafer, R.C., DC, FICC, (1991). The Chiropractic Assistant. Arlington, Virginia: The American Chiropractic Association.

<http://www.ccachiro.org/cdninfo.ht> the Canadian Chiropractic Association Infosite

<http://www.jcca-online.com/index.html>: The Journal of the Canadian Chiropractic Association website

<http://www.mbnet.mb.ca/~jwiens/chiro3.sht> : The Chiropractic Page (Canadian)

<http://www.internets.com/chiropra.htm>: Chiropractic Search Engines website

<http://www.webgate.net/~welchiro/chiro.html>: Canadian chiropractic website

V. EVALUATION PROCESS/GRADING SYSTEM:

Two Tests @ 25% each	50%
Project: developing a client file, and financial statement based on a case study	25%
Report: Summary of OCA Patient Management System outlining how to schedule patient appointments, record patient activity and payments, print a patient statement, and prepare OHIP and WCB submissions.	25%

GRADING SCHEME:

The following semester grades will be assigned to students in postsecondary courses:

<u>Grade</u>	<u>Definition</u>	<u>Grade Point Equivalent</u>
A+	90 - 100%	4.00
A	80 - 89%	3.75
B	70 - 79%	3.00
C	60 - 69%	2.00
R (Repeat)	59% or below	0.00
CR (Credit)	Credit for diploma requirements has been awarded.	
S	Satisfactory achievement in field placement or non-graded subject areas.	
U	Unsatisfactory achievement in field placement or non-graded subject areas.	
X	A temporary grade. This is used in limited situations with extenuating circumstances giving a student additional time to complete the requirements for a course (see <i>Policies & Procedures Manual – Deferred Grades and Make-up</i>).	
NR	Grade not reported to Registrar's office. This is used to facilitate transcript preparation when, for extenuating circumstances, it has not been possible for the faculty member to report grades.	

VI. SPECIAL NOTES:Special Needs:

If you are a student with special needs (e.g. physical limitations, visual impairments, hearing impairments, or learning disabilities), you are encouraged to discuss required accommodations with your instructor and/or the Special Needs office. Visit Room E1204 or call Extension 493, 717, or 491 so that support services can be arranged for you.

Retention of course outlines:

It is the responsibility of the student to retain all course outlines for possible future use in acquiring advanced standing at other postsecondary institutions.

Plagiarism:

Students should refer to the definition of “academic dishonesty” in *Student Rights and Responsibilities*. Students who engage in “academic dishonesty” will receive an automatic failure for that submission and/or such other penalty, up to and including expulsion from the course/program, as may be decided by the professor/dean. In order to protect students from inadvertent plagiarism, to protect the copyright of the material referenced, and to credit the author of the material, it is the policy of the department to employ a documentation format for referencing source material.

Course outline amendments:

The Professor reserves the right to change the information contained in this course outline depending on the needs of the learner and the availability of resources.

Substitute course information is available in the Registrar's office.

VII. PRIOR LEARNING ASSESSMENT:

Students who wish to apply for advanced credit in the course should consult the professor. Credit for prior learning will be given upon successful completion of a challenge exam or portfolio.

VIII. DIRECT CREDIT TRANSFERS:

Students who wish to apply for direct credit transfer (advanced standing) should obtain a direct credit transfer form from the Dean's secretary. Students will be required to provide a transcript and course outline related to the course in question.