

STUDENT NAME: _____
 TRAINING SITE: _____

Student # _____

**MEDICAL ASSISTING
 Medical Office Management
 Performance Evaluation Score Sheet**

Performance rating scale:

- 4 = highly skilled
- 3 = moderately skilled
- 2 = limited skill
- 1 = not skilled
- 0 = not skilled

- Successfully demonstrated without supervision
- Successfully demonstrated with limited supervision
- Demonstrated with close supervision
- Demonstration requires direct instruction and supervision
- Student did not complete demonstration

A minimum score of 3 for each of the following performance skills must be achieved to meet State skill certification requirements.

	Date	4	3	2	1	0
MEDICAL OFFICE MANAGEMENT						
BASIC COMPUTER KNOWLEDGE TO:						
1. Generate a Patient Record						
2. Prepare a Billing Statement						
3. Complete an Insurance Form						
PATIENT RECEPTION						
1. Collation of Patient Records						
2. Demonstrate the Following:						
a. Opening the Office						
b. Closing the Office						
3. Greeting the Patient						
4. Responding to the Patient						
5. Escorting and Instructing the Patient						
ORAL COMMUNICATION						
1. Demonstrate Methods of Receiving, Placing & Recording Calls						
a. Answer the Office Telephone						
b. Receive, Evaluate & Record a Phone Message						
c. Make Referrals by Phone						
2. Schedule Appointments by Phone						

STUDENT NAME: _____

	Date	4	3	2	1	0
MEDICAL RECORDS MANAGEMENT						
1. Demonstrate Filing:						
a. Alphabetically						
b. Numerically						
ACCOUNTING/BILLING AND COLLECTING						
1. Prepare the Following:						
a. Accounts Payable & Receivable						
b. Daysheet						
c. Petty Cash						
d. Prepare Ledger						
e. Patient's Itemized Monthly Statement						
BANKING SERVICE						
1. Prepare a Bank Deposit						
2. Write Checks						
3. Demonstrate a Bank Reconciliation						
INSURANCE						
1. Complete HCFA Insurance Form						
RESUME/PLACEMENT						
1. As Directed by Instructor						

 Teacher's Signature

 Date

 Student's Signature

The instructor must keep this document on file for one year.