## **Medical Office**

WISCONSIN—YOUTH APPRENTICESHIP

Youth Apprenticeship

#### **MEDICAL OFFICE**

Medical office youth apprentices perform a variety of administrative tasks in a medical office or patient scheduling centers.

Length of Apprenticeship: One year

#### REQUIRED COMPETENCIES

Youth apprentices must become proficient in both general employability and occupation-specific competencies. All of these, and examples of how each can be demonstrated, are found in the following pages. A total of 10 occupational competencies must be learned for this occupation. Employers may substitute out one of these and should write in the competency they are adding. Youth apprentices must be evaluated on these competencies at least two times each year of their apprenticeship.

#### **Competencies**

- 1. Locate information in the client record
- 2. Create and/or maintain a client record
- 3. Navigate the medical record and/or client scheduling software
- 4. Manage client appointments
- 5. Answer phones
- 6. Perform basic payment collection
- 7. Use common office software applications
- 8. Order and receive supplies and/or equipment
- 9. Perform an inventory of supplies and/or equipment
- 10. Demonstrate customer service skills

#### REGISTERED APPRENTICESHIP BRIDGING OPPORTUNITIES

The following Registered Apprenticeship is available in this area:

- Medical Assistant registered apprenticeship
- Community Health Worker registered apprenticeship

#### POST-SECONDARY PATHWAY OPPORTUNITIES

There are several post-secondary pathway opportunities in this area. The following is a partial list.

- Medical Assistant
- Medical Administrative Professional
- Health Information Technology



# **Medical Office**

Youth Apprenticeship

## ON-THE-JOB LEARNING PERFORMANCE STANDARDS GUIDE

#### YOUTH APPRENTICE INFORMATION

Youth Apprentice Name	
YA Coordinator	
YA Consortium	
School District	
SIGNATURES	
The On-the-Job Learning Performance Standar	rds Guide includes a list of competencies youth
apprentices learn through mentoring and train	ning at the worksite.
should be reviewed with the employer/mento	tors and School-Based or YA coordinators: This document or, school-based or YA coordinator on a regular basis with olan future steps to ensure completion of the required rdinator, and the apprentice sign below.
<u>Em</u> 1 <sup>st</sup> Evaluation (Required)	<u>ployer/Mentor</u> 2 <sup>nd</sup> Evaluation (Required)
Employer/Mentor Signature	Employer/Mentor Signature
Employer/Mentor	Employer/Mentor
Business/Company	Business/Company
Date Signed	Date Signed
3 <sup>rd</sup> Evaluation (Optional)	4th Evaluation (Optional)
Employer/Mentor Signature	Employer/Mentor Signature
Employer/Mentor	Employer/Mentor
Business/Company	Business/Company
Date Signed	Date Signed

# **School-Based and/or YA Coordinator**

#### 1<sup>st</sup> Evaluation (Required)

## 2<sup>nd</sup> Evaluation (Required)

School-Based and/or YA Coordinator Signature	School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator	School-Based and/or YA Coordinator
School District or Organization	School District or Organization
Date Signed	Date Signed

## 3<sup>rd</sup> Evaluation (Optional)

#### 4th Evaluation (Optional)

School-Based and/or YA Coordinator Signature	School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator	School-Based and/or YA Coordinator
School District or Organization	School District or Organization
Date Signed	Date Signed

## **Youth Apprentice**

#### 1<sup>st</sup> Evaluation (Required)

## 2<sup>nd</sup> Evaluation (Required)

Youth Apprentice Signature	Youth Apprentice Signature
Youth Apprentice	Youth Apprentice
School District / High School	School District / High School
Date Signed	Date Signed

## 3<sup>rd</sup> Evaluation (Optional)

#### 4th Evaluation (Optional)

Youth Apprentice Signature	Youth Apprentice Signature
Youth Apprentice	Youth Apprentice
School District / High School	School District / High School
Date Signed	Date Signed

## EMPLOYABILITY SKILLS (TO BE COMPLETED BY YA EMPLOYER/MENTOR)

All youth apprentices must demonstrate the key employability skills listed below in order to complete the YA program. They do so by earning at least a "Meets Expectation" rating in each. At least two evaluations are required each year of a youth apprenticeship. More columns are included below for those who choose to conduct more frequent reviews.

1	Working to Meet Expectations: Needs improvement; requires much assistance and supervision;
	rarely displays this behavior
2	Meets Expectations: Meets entry-level criteria; requires some supervision; often displays this
	behavior
3	Exceeds Expectations: Exceeds entry-level criteria; requires minimal supervision; consistently
	displays this behavior

Employability Skills		Rati	ng	
	Minim	um Ratin	g of 2 for	EACH
Competency and Rating Criteria		Check I	Rating	
Competency and Rating Criteria	Initial	Mid	Mid	Final
		Year 1	Year 2	
<ol> <li>Develops positive work relationships with others.         Examples of qualities and habits that the employee might exhibit include         Interacts with others with respect and in a non-judgmental manner         Responds to others in an appropriate and non-offensive manner         Helps co-workers and peers accomplish tasks or goals         Applies problem-solving strategies to improve relations with others         When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation     </li> </ol>	☐ 1 ☐ 2 ☐ 3			
<ul> <li>Communicates effectively with others         Examples of qualities and habits that the employee might exhibit include     </li> <li>Adjusts the communication approach for the target audience, purpose, and situation to maximize impact</li> <li>Organizes messages/information in a logical and helpful manner</li> <li>Speaks clearly and writes legibly</li> <li>Models behaviors to show active listening</li> <li>Applies what was read to actual practice</li> <li>Asks appropriate questions for clarity</li> </ul>	☐ 1 ☐ 2 ☐ 3			
<ul> <li>Collaborates with others         Examples of qualities and habits that the employee might exhibit include     </li> <li>Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities</li> <li>Shares responsibility for collaborative work and decision making</li> <li>Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise</li> <li>Avoids contributing to an unproductive group conflict</li> <li>Shares information and carries out responsibilities in a timely manner</li> </ul>	☐ 1 ☐ 2 ☐ 3			

Employability Skills		Rati	ing	
. , ,	Minim	um Ratin		EACH
		Check I		
Competency and Rating Criteria	Initial	Mid	Mid	Final
		Year 1	Year 2	
4. Maintains composure under pressure	□1	<b>□1</b>	<b>□</b> 1	<b>□1</b>
Examples of qualities and habits that the employee might exhibit include	☐ <del>-</del>	☐ <b>2</b>	□ <u>-</u> □ 2	□ <b>-</b>
<ul> <li>Uses critical thinking to determine the best options or outcomes when</li> </ul>				
faced with a challenging situation	∐3	3	∐ 3	∐ 3
<ul> <li>Carries out assigned duties while under pressure</li> </ul>				
<ul> <li>Acts in a respectful, professional, and non-offensive manner while under</li> </ul>				
pressure				
Applies stress management techniques to cope under pressure				
5. Demonstrates integrity	<b>□</b> 1	<b>□</b> 1	<b>□</b> 1	<b>□</b> 1
Examples of qualities and habits that the employee might exhibit include	<u> </u>		 □ 2	 2
<ul> <li>Carries out responsibilities in an ethical, legal and confidential manner</li> </ul>	□ <del>-</del>	□ <del>-</del>	□- □3	□-
Responds to situations in a timely manner	L 3		ა	3
Takes personal responsibility to correct problems				
Models behaviors that demonstrate self-discipline, reliability, and				
dependability				
6. Performs quality work	<b>□</b> 1	<b>□</b> 1	<b>□1</b>	<b>□</b> 1
Examples of qualities and habits that the employee might exhibit include			 □ 2	 2
Carries out written and verbal directions accurately				
Completes work efficiently and effectively	🗀 3	3	∐ 3	∐3
Performs calculations accurately				
Conserves resources, supplies, and materials to minimize costs and				
environmental impact				
Uses equipment, technology, and work strategies to improve workflow				
Applies problem-solving strategies to improve productivity  Adheren to worksite regulations and protings.				
<ul> <li>Adheres to worksite regulations and practices</li> <li>Maintains an organized work area</li> </ul>				
• Iviaintains an organized work area				
7. Provides quality goods or services (internal and external)	□ 1	□ 1	□ 1	□ 1
Examples of qualities and habits that the employee might exhibit include	□2	□2	<b>□</b> 2	□2
<ul> <li>Shows support for the organizational goals and principles by own personal actions</li> </ul>	 3	 3	 3	 3
Displays a respectful and professional image to customers				
<ul> <li>Displays a respectful and professional image to customers</li> <li>Displays an enthusiastic attitude and desire to take care of customer needs</li> </ul>				
Seeks out ways to increase customer satisfaction				
Produces goods to workplace specifications				
8. Shows initiative and self-direction	<b>□1</b>	<b>□1</b>	<b>□1</b>	<b>□</b> 1
Examples of qualities and habits that the employee might exhibit include				
Prioritizes and carries out responsibilities without being told	<u> </u> 2	<u> </u>	∐ 2 □ 2	<b>∐2</b>
Responds with enthusiasm and flexibility to handle tasks that need		3	∐ 3	<b>∐</b> 3
immediate attention				
<ul> <li>Reflects on any unsatisfactory outcome as an opportunity to learn</li> </ul>				
Improves personal performance by doing something different or differently				
<ul> <li>Analyzes how own actions impact the overall organization</li> </ul>				
Supports own action with sound reasoning and principles				
Balances personal activities to minimize interference with work				
responsibilities				

Employability Skills		Rat	ing	
. , ,	Minim		g of 2 for	EACH
Compatency and Bating Critoria		Check I		
Competency and Rating Criteria	Initial	Mid	Mid	Final
		Year 1	Year 2	
9. Adapts to change	□ 1	□ 1	□ 1	□ 1
Examples of qualities and habits that the employee might exhibit include	□ 2	□ 2	□ 2	□ 2
<ul> <li>Shows flexibility and willingness to learn new skills for various job roles</li> <li>Uses problem-solving and critical-thinking skills to cope with changing</li> </ul>	□ 3	□ 3	□ 3	□ 3
circumstances				
Modifies own work behavior based on feedback, unsatisfactory outcomes,				
efficiency, and effectiveness				
Displays a "can do" attitude				
10. Domanstrates safety and sequrity regulations and practices				
10. Demonstrates safety and security regulations and practices  Examples of qualities and habits that the employee might exhibit include				
Follows personal safety requirements	<u> </u> 2	<u></u>	<u></u>	<u></u>
Maintains a safe work environment	3	∐ 3		<b>□</b> 3
Demonstrates professional role in an emergency				
Follows security procedures				
Maintains confidentiality				
11. Applies job-related technology, information, and media	<b>□</b> 1	1	<b>□</b> 1	<b>□1</b>
Examples of qualities and habits that the employee might exhibit include		☐ <b>2</b>		☐ <u>1</u>
Applies technology effectively in the workplace				
Assesses and evaluates information on the job	3	∐ 3	3	
Assesses training manuals, website, and other media related to the job				
12. Fulfills training or certification requirements for employment	<b>□</b> 1	<b>□</b> 1	<b>□</b> 1	<b>□</b> 1
Examples of this requirement may include				 2
Participation in required career-related training and/or educational	<u> </u>		<u> </u>	 □3
programs				
<ul> <li>Passing certification tests to qualify for licensure and/or certification</li> <li>Participation in company training or orientation</li> </ul>				
Participation in company training of orientation				
13. Sets personal goals for improvement	<b>□</b> 1	<u> </u>	<b>□</b> 1	<b>1</b>
Examples of this requirement may include	□ 2	□ 2	□ 2	□ 2
Setting goals that are specific and measurable  Setting work related and a that align with the agree pictical and a second and a s	3	3	<b>□</b> 3	<b>□</b> 3
<ul> <li>Setting work-related goals that align with the organization's mission</li> <li>Identifying strategies to reach goals</li> </ul>				
Reflecting on goal progress to regularly evaluate and modify goals				
The results of goal progress to regularly evaluate and meanly goals				

# OCCUPATIONAL COMPETENCIES (TO BE COMPLETED BY YA EMPLOYER/MENTOR)

Youth apprentices must earn a rating of at least "MEETS EXPECTATIONS" in each competency by the conclusion of the apprenticeship. A total of 10 competencies, 9 must be from the list below. If necessary, employers can substitute one competency with another occupationally appropriate skill. That skill should be added to the competency list for assessment. At least two evaluations are required each year of a youth apprenticeship. More columns are included below for those who choose to conduct more frequent reviews.

1	Working to Meet Expectations: Needs improvement; requires much assistance and supervision;
	rarely displays this behavior
2	Meets Expectations: Meets entry-level criteria; requires some supervision; often displays this
	behavior
3	Exceeds Expectations: Exceeds entry-level criteria; requires minimal supervision; consistently
	displays this behavior

	Occupational Competencies		Rat	ing	
	Competency and Rating Criteria	Year 1 Evaluation Minimum Rating of 2 for Check Rating			
		Initial	Mid Year 1	Mid Year 2	Final
1.	Locate information in the client record	<b>□1</b>	<b>□1</b>	<b>□1</b>	<b>□1</b>
	<ul> <li>access appropriate client record</li> <li>navigate the client record to locate information</li> <li>assemble information as requested</li> <li>maintain confidentiality of client information</li> </ul>	2 3	2 3	2 3	2 3
2.	<ul> <li>Create and/or maintain a client record</li> <li>ensure client privacy and comply with HIPAA requirements</li> <li>verify the patient's current address, phone number and allergy information</li> <li>ensure client identification appears on each record or form used</li> <li>confirm accuracy of information</li> <li>copy or scan insurance cards or other documents as required</li> </ul>	☐ 1 ☐ 2 ☐ 3	☐ 1 ☐ 2 ☐ 3	□ 1 □ 2 □ 3	□ 1 □ 2 □ 3
3.	<ul> <li>Navigate the medical record and/or client scheduling software</li> <li>open the record</li> <li>accurately schedule appointments or check in clients</li> <li>accurately utilize medical terminology in scheduling medical appointments</li> </ul>	☐ 1 ☐ 2 ☐ 3	☐ 1 ☐ 2 ☐ 3	□ 1 □ 2 □ 3	☐ 1 ☐ 2 ☐ 3

Occupational Competencies		Rati	ing	
	,	Year 1 Ev	aluation	
	Minim	um Ratin	g of 2 for	EACH
Competency and Rating Criteria		Check I	Rating	
	Initial	Mid	Mid	Final
	IIIILIAI	Year 1	Year 2	riiidi
4. Manage client appointments	□ 1	□ 1	□ 1	□ 1
greet client	<b>□</b> 2	□2	<b>□</b> 2	□2
display sensitivity to client information	 3	 3	 □ 3	 3
<ul> <li>refer client for priority scheduling or urgent care</li> </ul>				
identify the time required for the health service				
enter appointment and other required information				
<ul> <li>document scheduling changes in the correct locations</li> </ul>				
manage appointment reminders				
<ul> <li>enter appointment results: late, no show, rescheduled, cancelled, etc.</li> </ul>				
5. Answer phones	<b>□1</b>	<b>□1</b>	<b>□1</b>	<b>□1</b>
answer promptly with an appropriate greeting	□ - □ 2	□ - □ 2	□ <u>-</u> □ 2	□ <u>-</u> □ 2
triage calls as appropriate	_			□ 2
transfer call to appropriate individual when necessary minimizing time	∐ 3	∐ 3	∐ 3	<u></u> ⊔ 3
on hold				
respond discretely to the caller				
<ul> <li>do not provide confidential information without appropriate</li> </ul>				
authorization				
take messages correctly documenting information				
6. Perform basic payment collection	<u> </u>	□ 1	□ 1	□ 1
<ul> <li>verify insurance coverage, deductibles, and co-payments using</li> </ul>	_ 2	2	_ 2	_ 2
electronic systems or other means	 □ 3	 □3	 □3	 □ 3
<ul> <li>document disbursements or deposits to the cash drawer in the</li> </ul>			]	
appropriate record				
operate cash register and make accurate change if applicable				
7. Use common office software applications	□ 1	□ 1	□ 1	□ 1
utilize basic features of office software	<b>2</b>	□ 2	<b>2</b>	□ 2
manage files within an application	☐ 3	□ 3	□ 3	□ 3
<ul> <li>perform common editing and formatting functions</li> </ul>				
perform common printing functions				
O Orden and receive compliant and for a surface and				
8. Order and receive supplies and/or equipment	<b>∐</b> 1	<u></u>	<b>∐1</b>	<b>∐</b> 1
place orders for supplies, equipment, and/or medications     varify the graph of a chipment.	□ 2	☐ 2	□ 2	□ 2
verify the receipt of a shipment     identify symply items and for modifications associated bondling on	☐ 3	□ 3	☐ 3	☐ 3
identify supply items and/or medications requiring special handling or     storage				
storage				
store and stock items appropriately				
update inventory record				
file or route warranty and service agreements as appropriate				
file or route the Packing Slip and/or any Material Data Sheets (MDS)      received to the appropriate places.				
received to the appropriate places				

Occupational Competencies	Rating				
	Year 1 Evaluation				
		Minimum Rating of 2 for EACH			
Competency and Rating Criteria	Check Rating				
		Mid	Mid		
	Initial	Year 1	Year 2	Final	
9. Perform an inventory of supplies and/or equipment	<u> </u>	<b>□</b> 1	<b>1</b>	<b>□</b> 1	
<ul> <li>complete inventory of supplies, equipment, and/or medications</li> </ul>	2				
document inventory	□ 2		☐ 2 ☐ 3		
<ul> <li>communicate changes in availability to worksite professional</li> </ul>	3		3	3	
<ul> <li>assist with removal and disposal of expired, damaged, and/or recalled</li> </ul>					
items as required					
straighten and clean shelves					
511 d. 611 d. 1 d. 1 d. 1 d. 1 d. 1 d. 1					
10. Demonstrate customer service skills	<b>1</b>	<b>□1</b>	<b>□1</b>	<b>□</b> 1	
focus on effective customer communication	□ <b>1</b>	☐ <b>2</b>	□ <u>1</u> □ 2	□ <u>1</u>	
<ul> <li>determine responsive methods to identify and meet customer needs</li> </ul>	_				
determine effective customer follow-up procedures	<b>3</b>	3	3	3	
meet the needs of the diverse customer					
Competency Substitute (if you replaced a competency above, note the	<b>□</b> 1	<b>□1</b>	<b>□</b> 1		
competency and rating)	□ <b>-</b>	☐ 2	□ <u>-</u> 2	□ <b>2</b>	
competency and rating,	_				
	<b>3</b>	<b>□</b> 3	<b>∐</b> 3	3	
Comments:					
comments.					

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