

**NHA Certified Clinical Medical Assistant (CCMA)  
Test Plan for the CCMA Exam**

*150 Scored Items/30 Pretest Items  
Exam Time: 3 hours*

*\*Based on The Results of a Job Analysis Completed in 2022*

*This document provides both a summary and detailed outline of the topics that may be covered on the CCMA Certification Examination. The summary examination outline specifies domains and subdomains that are covered on the examination and the number of test items per domain.*

*The detailed outline adds to the summary outline by including task and knowledge statements associated with each domain on the test plan. Task statements reflect the duties that a candidate will need to know how to properly perform. Knowledge statements reflect information that a candidate will need to know and are in support of task statements. Items on the examination might require recall and critical thinking pertaining to a knowledge statement, a task statement, or both.*

## CCMA Summary Examination Outline

DOMAIN	# of Items on Examination
1. Foundational Knowledge and Basic Science	15
2. Anatomy and Physiology	8
3. Clinical Patient Care	84
A. Patient Intake and Vitals (14 items)	
B. General Patient Care (28 items)	
C. Infection Control and Safety (15 items)	
D. Point of Care Testing and Laboratory Procedures (9 items)	
E. Phlebotomy (12 items)	
F. EKG and Cardiovascular Testing (6 items)	
4. Patient Care Coordination and Education	12
5. Administrative Assisting	12
6. Communication and Customer Service	12
7. Medical Law and Ethics	7
<b>Total</b>	<b>150</b>

**Domain 1: Foundational Knowledge and Basic Science (15 items)**

Tasks	Knowledge of:
	<p><b>A. Health Care Systems and Settings</b></p> <ul style="list-style-type: none"> <li>k1. Roles, responsibilities, scope of practice, and titles of medical assistants</li> <li>k2. Roles, responsibilities, scope of practice, titles, and credentials of medical providers and allied health personnel</li> <li>k3. Licensing versus certification; maintenance of certification</li> <li>k4. Types of health care organizations and delivery models (for example, outpatient/inpatient, patient centered medical home, collaborative care, accountable care organization, hospice, home health care, mobile health unit)</li> <li>k5. Technology-based methods for providing health care and health information (for example, telehealth/virtual, patient portals)</li> <li>k6. Health care payment models (for example, fee for service, value-based plans)</li> <li>k7. General versus specialty health care and services</li> <li>k8. Ancillary services and complementary therapies</li> </ul> <p><b>B. Medical Terminology</b></p> <ul style="list-style-type: none"> <li>k9. Common abbreviations, acronyms, and symbols</li> <li>k10. The Joint Commission’s (TJC) “Do Not Use” List</li> <li>k11. Medical word building (roots, prefixes, suffixes, plurals)</li> <li>k12. Lay terms and medical terms for common conditions, symptoms, and procedures</li> <li>k13. Positional and directional terminology</li> </ul> <p><b>C. Basic Pharmacology</b></p> <ul style="list-style-type: none"> <li>k14. Drug classifications (for example, diuretics, hypoglycemics, analgesics, over-the-counter), indications,</li> </ul>

	<p>commonly prescribed medications</p> <p>k15. Drug classifications and schedules of controlled substances</p> <p>k16. Differences between side effects and adverse effects; and between indications and contraindications</p> <p>k17. Measurements (for both metric and standard systems) and dosage calculations, mathematical conversions/formulas</p> <p>k18. Forms of medication (for example, tablets, patches, capsules)</p> <p>k19. Look-alike/sound-alike medications</p> <p>k20. Routes of medication administration</p> <p>k21. Pharmacokinetics (absorption, distribution, metabolism, excretion)</p> <p>k22. Rights of medication administration</p> <p>k23. Principles of storage and disposal</p> <p>k24. Sources of drug/medication information and FDA regulations</p> <p><b>D. Nutrition</b></p> <p>k25. Dietary nutrients, suggested guidelines, and food labels</p> <p>k26. Dietary needs related to diseases and conditions (for example, diabetes, kidney disease, celiac disease)</p> <p>k27. Vitamins and supplements</p> <p>k28. Eating disorders</p> <p><b>E. Psychology</b></p> <p>k29. Developmental stages</p> <p>k30. Signs and symptoms of common mental health conditions (for example, anxiety, depression, PTSD, ADHD)</p> <p>k31. Environmental and socioeconomic stressors</p> <p>k32. Psychology of the physically disabled, developmentally delayed, and those who have diseases</p> <p>k33. Defense mechanisms</p> <p>k34. End of life and stages of grief</p>
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**Domain 2: Anatomy and Physiology (8 items)**

Tasks	Knowledge of:
<p>2A. Body Structures and Organ Systems</p>	<p>k35. Cell structure (for example, nucleus, cell membrane, cytoplasm, ribosomes, mitochondria, lysosomes)</p> <p>k36. Anatomical structures, locations, and positions</p> <p>k37. Structure and function of major body systems, including organs and their locations</p> <p>k38. Interactions between organ systems, homeostasis</p>
<p>2B. Pathophysiology and Disease Processes</p>	<p><u>Knowledge of:</u></p> <p>k39. Signs, symptoms, and etiology of common diseases, conditions, and injuries</p> <p>k40. Diagnostic measures (for example, labs, imaging, biopsies) and treatment modalities (for example, infusion, chemotherapy, medication, surgery)</p> <p>k41. Incidence, prevalence, risk factors, and comorbidities</p> <p>k42. Epidemics and pandemics</p>

**Domain 3: Clinical Patient Care (84 items)**

Tasks	Knowledge of:
<p><b>A. Patient Intake and Vitals (14 items)</b></p> <p><u>Tasks</u></p> <p>3A1. Ensure patient safety within the clinical setting.</p> <p>3A2. Identify patient.</p> <p>3A3. Complete a comprehensive clinical intake process, including the purpose of the visit.</p> <p>3A4. Measure and obtain vital signs.</p> <p>3A5. Convert measurements of vital signs.</p> <p>3A6. Obtain anthropometric measurements.</p>	<p><u>Knowledge of:</u></p> <p>k43. Patient identifiers (for example, name, date of birth [DOB], medical record number, last 4 digits of Social Security Number [SSN])</p> <p>k44. Elements of a patient medical/surgical/family/social history</p> <p>k45. Screenings and wellness assessments (for example, tobacco cessation, alcohol use, HIV screening)</p> <p>k46. Mental health screenings (for example, mini mental state exam; anxiety and</p>

<p>3A7. Identify, document, and report abnormal signs and symptoms.</p>	<p>depression screening tools</p> <p><u>Vital signs</u></p> <p>k47. Blood pressure—methods for obtaining (manual, palpating, electronic), in-range and out-of-range values, common errors, and trouble-shooting methods</p> <p>k48. Orthostatics—methods for obtaining, common errors</p> <p>k49. Pulse—methods for obtaining in various locations, abnormal rhythms, in-range and out-of-range values</p> <p>k50. Respiratory rate—methods for obtaining, in-range and out-of-range values, types of abnormal patterns (for example, apnea, hyperventilation, dyspnea)</p> <p>k51. Pulse oximetry—in-range and out-of-range values, locations, and common errors</p> <p>k52. Temperature—methods for obtaining in various locations, coordinating ranges, common errors</p> <p>k53. Pain scale</p> <p>k54. Menstrual status and last menstrual period</p> <p>k55. Factors impacting vital signs (for example, age, medications)</p> <p>k56. Conversion formulas for vital signs (for example, height, weight, temperature)</p> <p>k57. Methods for measuring height, weight, BMI, and body and waist circumference; special considerations related to age, health, status, disability</p> <p>k58. Pediatric measurements and growth chart</p>
<p><b>B. General Patient Care (28 items)</b></p> <p><u>Tasks</u></p> <p>3B1. Prepare examination/procedure room.</p> <p>3B2. Prepare and maintain a sterile field.</p> <p>3B3. Prepare patient for procedures, including providing education.</p> <p>3B4. Assist provider with general and</p>	<p><u>Knowledge of:</u></p> <p>k59. Guidelines for establishing a sterile field</p> <p>k60. Sterile techniques related to examinations, procedures, injections, and medication administration</p> <p>k61. Positioning and draping requirements for general and specialty examinations, procedures, and treatments</p>

<p>specialty physical examination.</p> <p>3B5. Prepare and administer medications and/or injectables using nonparenteral routes.</p> <p>3B6. Prepare and administer medications and/or injectables using parenteral routes (excluding intravenous).</p> <p>3B7. Manage injection logs (for example, controlled substances, tuberculosis medications, immunizations).</p> <p>3B8. Perform staple and suture removal.</p> <p>3B9. Perform ear and eye irrigation.</p> <p>3B10. Administer first aid and basic wound care.</p> <p>3B11. Identify and respond to emergency/priority situations.</p> <p>3B12. Assist provider with patients presenting with minor and traumatic injury.</p> <p>3B13. Assist with surgical interventions (for example, sebaceous cyst removal, toenail removal, colposcopy, cryosurgery).</p> <p>3B14. Review provider's discharge instructions/plan of care with patients.</p> <p>3B15. Follow guidelines for sending orders for prescriptions and refills electronically, by telephone, fax, or email.</p> <p>3B16. Order and obtain durable medical equipment (DME) and supplies (for example, CPAP, wheelchair, hospital bed).</p> <p>3B17. Document relevant aspects of patient care in patient record.</p> <p>3B18. Operate basic functions of an electronic medical record/electronic health record (EMR/EHR) system.</p> <p>3B19. Implement updates in EMR/EHR (for example, quality measures, alerts, telemedicine, population health reporting).</p> <p>3B20. Enter orders using computerized physician order entry.</p> <p>3B21. Conduct telehealth or virtual</p>	<p>k62. Equipment, supplies, and instruments required for general physical examinations</p> <p>k63. Equipment, supplies, and instruments required for specialty examinations or procedures</p> <p>k64. Patient instruction specific to procedures, including pre- and postprocedural instructions</p> <p>k65. Modifications to patient care depending on patient needs (for example, assisting with ambulation and transfers for frail and disabled patients; using terms a child can understand for pediatric patients)</p> <p>k66. Immunization schedules, requirements, and registries; adverse effects documentation and reporting</p> <p>k67. Allergies (for example, medication, food, environmental); contraindications; type of reactions (mild, moderate, and severe); how to respond to allergic reactions or anaphylactic shock</p> <p>k68. Dosage calculations related to injectables and oral medications</p> <p>k69. Commonly used oral and parenteral medications, including forms, packaging, routes of administration, and rights of medication administration</p> <p>k70. Methods of administration, techniques, procedures, and supplies related to eye and ear medications</p> <p>k71. Storage, labeling, expiration dates, and medication logs</p> <p>k72. Techniques (for example, needle angle, gauge, length) and injection site (for example, intramuscular, subcutaneous)</p> <p>k73. Supplies and equipment related to injections</p> <p>k74. Storage of injectables</p> <p>k75. Techniques and instruments for suture and staple removal; types and sizes of sutures</p> <p>k76. Instruments, supplies, and techniques related to eye and ear irrigation</p> <p>k77. Commonly occurring types of injuries</p>
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<p>screenings in the context of a telehealth/virtual visit.</p>	<p>(for example, lacerations, abrasions, fractures, sprains, burns)</p> <p>k78. Treatment for commonly occurring types of injuries (for example, bandaging, ice, elevation)</p> <p>k79. Signs and symptoms of wound infection (for example, redness, pus, swelling, discharge) and wound stages</p> <p>k80. Commonly occurring types of surgical interventions</p> <p>k81. Signs and symptoms related to urgent and emergency situations (for example, diabetic shock, heat stroke, allergic reactions, choking, syncope, seizure)</p> <p>k82. Emergency action plans (for example, crash cart, emergency injectables)</p> <p>k83. Procedures to perform CPR, basic life support, and automated external defibrillator (AED)</p> <p>k84. Legal requirements for content and transmission of prescriptions</p> <p>k85. Electronic prescribing software, screening requirements for prescription refills</p> <p>k86. Specialty pharmacies (for example, compounding and nuclear pharmacies; forms of medication available such as liquid, elixir, balm, ointment)</p> <p>k87. Required components of medical records</p> <p>k88. Prior authorizations for medication durable medical equipment (DME)</p> <p>k89. Computerized Physician Order Entry (CPOE)</p> <p>k90. Patient conditions appropriate for telehealth/virtual visit</p> <p>k91. Modifications in care related to delivery of telehealth/virtual health care</p>
<p><b>C. Infection Control and Safety (15 items)</b></p> <p><u>Tasks</u></p> <p>3C1. Adhere to standard and universal precautions and guidelines related to infection control.</p> <p>3C2. Adhere to regulations and guidelines</p>	<p><u>Knowledge of:</u></p> <p>k92. Common pathogens and nonpathogens</p> <p>k93. Organisms and micro-organisms</p> <p>k94. Infectious agents, chain of infection, modes of transmission, and conditions for growth</p>

<p>related to infectious diseases.</p> <p>3C3. Follow guidelines related to use of personal protective equipment (PPE), including donning and doffing.</p> <p>3C4. Adhere to guidelines regarding hand hygiene.</p> <p>3C5. Perform disinfection/sanitization.</p> <p>3C6. Perform sterilization of medical equipment.</p> <p>3C7. Perform appropriate aseptic techniques for various clinical situations.</p> <p>3C8. Dispose of biohazardous materials as dictated by Occupational Safety and Health Administration (OSHA) (for example, sharps containers, biohazard bags).</p> <p>3C9. Follow post-exposure guidelines (for example, needle safety guidelines, use of eyewash stations).</p>	<p>k95. Signs and symptoms of infectious diseases</p> <p>k96. CDC guidelines for infectious disease (for example, prevention, reporting)</p> <p>k97. Guidelines for exposure to bloodborne pathogens (for example, OSHA, American Hospital Association [AHA])</p> <p>k98. Approaches for the control of infectious diseases, epidemics, and pandemics</p> <p>k99. Universal precautions</p> <p>k100. Standard precautions (for example, personal protective equipment)</p> <p>k101. Handwashing techniques</p> <p>k102. Alcohol-based rubs/sanitizer</p> <p>k103. Sterilization techniques (autoclave, instrument cleaner, germicidal disinfectants, disposables) and principles for maintaining sterilization equipment</p> <p>k104. Techniques for medical and surgical asepsis</p> <p>k105. Order of cleaning and types of cleaning products</p> <p>k106. Safety Data Sheets (SDS)</p> <p>k107. Cautions related to chemicals</p> <p>k108. Disposal methods</p> <p>k109. Exposure control plan</p> <p>k110. Logs (for example, maintenance, equipment servicing, temperature, quality control)</p>
<p><b>D. Point of Care Testing and Laboratory Procedures (9 items)</b></p> <p><u>Tasks</u></p> <p>3D1. Collect nonblood specimens (for example, urine, stool, cultures, sputum).</p> <p>3D2. Perform CLIA-waived testing.</p> <p>3D3. Recognize, document, and report in-range and out-of-range laboratory and test values.</p> <p>3D4. Match and label specimen to patient and completed requisition.</p> <p>3D5. Process, handle, and transport collected</p>	<p><u>Knowledge of:</u></p> <p>k111. Point-of-care testing</p> <p>k112. Information required on completed requisition and/or form per provider order (for example, type of test, date, time, diagnostic code)</p> <p>k113. Specimen collection techniques and requirements</p> <p>k114. CLIA-waived testing regulations</p> <p>k115. Quality controls (internal and external)</p> <p>k116. In-range and out-of-range laboratory and test values</p> <p>k117. Preanalytical and postanalytical errors</p>



<p>specimens.</p> <p>3D6. Perform vision and hearing tests.</p> <p>3D7. Perform allergy testing.</p> <p>3D8. Perform spirometry/pulmonary function tests (electronic or manual).</p> <p>3D9. Identify common testing errors leading to testing discrepancies or inaccurate results.</p>	<p>that affect testing results</p> <p>k118. Elements related to vision and hearing tests</p> <p>k119. Peak flow rates</p> <p>k120. Scratch test and intradermal allergy test</p> <p>k121. Requirements for transportation, diagnosis, storage, and disposal of specimens (for example, patient identifiers, site, test, chain of custody)</p>
<p><b>E. Phlebotomy (12 items)</b></p> <p><u>Tasks</u></p> <p>3E1. Prepare patient for procedure.</p> <p>3E2. Verify order details.</p> <p>3E3. Select appropriate supplies for test(s) ordered (for example needle sizes, tubes).</p> <p>3E4. Determine venipuncture site accessibility based on patient age and condition.</p> <p>3E5. Prepare site for venipuncture.</p> <p>3E6. Determine order of draw.</p> <p>3E7. Perform venipuncture.</p> <p>3E8. Perform capillary puncture.</p> <p>3E9. Perform postprocedural care.</p> <p>3E10. Handle blood samples as required for diagnostic purposes.</p> <p>3E11. Process blood specimens for laboratory.</p> <p>3E12. Match and label specimen to patient and completed requisition.</p> <p>3E13. Recognize and respond appropriately to out-of-range test results.</p> <p>3E14. Prepare samples for transportation to a reference (outside) laboratory.</p> <p>3E15. Follow guidelines in distributing laboratory results to providers after matching patient to provider.</p>	<p><u>Knowledge of:</u></p> <p>k122. Blood components (for example, whole blood, plasma, serum platelets)</p> <p>k123. Bloodborne pathogens</p> <p>k124. Patient identifiers, content of requisition (for example, site or test, diagnostic code, dietary restrictions)</p> <p>k125. Patient preparation (for example, fasting/nonfasting, medication use, basal state, positioning)</p> <p>k126. Assessment of patient comfort/anxiety level with procedure</p> <p>k127. Considerations related to special patient needs (for example, need for support person or witness, use of restraints, chain of custody)</p> <p>k128. Medical conditions or history and medications affecting collection of blood</p> <p>k129. Blood vacuum tubes required for chemistry, hematology, and microbiology testing</p> <p>k130. Phlebotomy site preparation, including cleansing, wrapping, order of draw with microtubes</p> <p>k131. Anatomy, skin integrity, venous sufficiency, contraindications</p> <p>k132. Order of draw for venipuncture</p> <p>k133. Insertion and removal techniques</p> <p>k134. Evacuated tube, syringe, and butterfly methods</p> <p>k135. Types of tubes, tube positions, number of tube inversions, and fill level/ratios</p> <p>k136. Additives and preservatives</p>

	<ul style="list-style-type: none"> <li>k137. Bandaging procedures, including allergies and skin types</li> <li>k138. Preanalytical and postanalytical considerations pertaining to specimen quality and consistency</li> <li>k139. Special collections (for example, timed specimens, medication levels, blood cultures, fasting)</li> <li>k140. Centrifuge and aliquot</li> <li>k141. Expected and unexpected test values; control values</li> <li>k142. Equipment calibration</li> <li>k143. Storage conditions related to sensitivity to light and temperature</li> <li>k144. Requirements for transportation, diagnosis, storage, disposal</li> <li>k145. Processing and labeling requirements</li> <li>k146. External databases (for example, outside laboratories, reference sources)</li> </ul>
<p><b>F. EKG and Cardiovascular Testing (6 items)</b></p> <p><u>Tasks</u></p> <ul style="list-style-type: none"> <li>3F1. Prepare patient for EKG or ambulatory cardiac monitoring procedure.</li> <li>3F2. Identify types of leads and proper anatomical electrode placement.</li> <li>3F3. Perform EKG tests.</li> <li>3F4. Recognize abnormal or emergent EKG results (for example, dysrhythmia, arrhythmia, versus artifact).</li> <li>3F5. Assist provider with ambulatory cardiac monitoring (for example, stress test, Holter monitoring, event monitoring).</li> <li>3F6. Transmit results or report to patient's electronic medical record or paper chart and provider.</li> <li>3F7. Ensure proper functioning and storage of EKG equipment.</li> </ul>	<p><u>Knowledge of:</u></p> <ul style="list-style-type: none"> <li>k147. Techniques and methods for EKGs</li> <li>k148. Procedures and instructions to minimize artifacts</li> <li>k149. Artifacts, signal distortions, and electrical interference (for example, fuzz, wandering baseline)</li> <li>k150. Preparation, positioning, and draping of patient</li> <li>k151. Considerations related to patient characteristics (for example, anatomy, adult/pediatric, medical condition)</li> <li>k152. Supplies needed (for example, paper, correct leads, razor, tape)</li> <li>k153. Placement of limb and chest electrodes</li> <li>k154. Signs of adverse reaction during testing (for example, signs of distress, elevated blood pressure, respiration)</li> <li>k155. Abnormal rhythms or dysrhythmias associated with EKGs</li> <li>k156. Waveforms, intervals, segment</li> <li>k157. Calibration of equipment</li> </ul>

**Domain 4: Patient Care Coordination and Education (12 items)**

Tasks	Knowledge of:
4A. Review patient records prior to visit to ensure health care is comprehensively addressed.	k158. Preventive medicine, preventive screenings, and wellness
4B. Ensure that documentation of preventative maintenance and screenings is included in patient record.	k159. Clinical quality measures
4C. Identify timelines and track recommendations for screenings and preventative maintenance (for example, mammogram, Papanicolaou (Pap) test, colonoscopy, immunizations).	k160. Education delivery methods, instructional techniques, and learning styles for in-person and virtual visits
4D. Assist provider with researching and supplying information on community resources for clinical and non-clinical services.	k161. Patient education related to nutrition and healthy eating, including restrictions, recommendations, and relation to medications
4E. Coordinate with health care providers and community-based organizations for continuity of care.	k162. Available resources for clinical services (for example, home health care)
4F. Facilitate patient compliance (for example, continuity of care, follow up, medication compliance) to optimize health outcomes.	k163. Resources and procedures to coordinate care and outpatient services
4G. Participate in team-based patient care (for example, patient-centered medical home [PCMH], accountable care organization [ACO]).	k164. Available community resources for non-clinical services (for example, adult day care, transportation vouchers)
4H. Participate in transition of care for patients.	k165. Specialty resources for patient/family medical and cognitive needs
4I. Provide patient education via telehealth/virtual visit systems and processes.	k166. Barriers to care (for example, socioeconomic, cultural differences, language, education)
4J. Provide education to patients on communicable disease prevention.	k167. Roles and responsibilities of team members involved in patient-centered medical home (PCMH) and team-based care (TBC)
	k168. Referral forms and processes
	k169. Methods for the prevention of transmission communicable diseases

**Domain 5: Administrative Assisting (12 items)**

Tasks	Knowledge of:
5A. Schedule and monitor patient appointments using electronic and paper-based systems.	k170. Types of office visits (for example, new patient, telehealth/virtual, annual wellness, specialty, sports/school physical), and requirements for each
5B. Determine the type of appointment	

<p>needed.</p> <p>5C. Prioritize appointment needs based on urgency.</p> <p>5D. Monitor patient flow sheets, superbill, or encounter forms.</p> <p>5E. Verify insurance coverage/financial eligibility.</p> <p>5F. Identify and check patients in/out.</p> <p>5G. Confirm appropriate diagnostic and procedural codes.</p> <p>5H. Obtain and verify prior authorizations and precertifications (for example, for prescriptions, procedures, radiology).</p> <p>5I. Prepare documentation and billing requests using current coding guidelines.</p> <p>5J. Ensure that documentation complies with government and insurance requirements.</p> <p>5K. Perform charge reconciliation (for example, enter charges, post payments, make adjustments, process accounts receivable).</p> <p>5L. Bill patients, insurers, and third-party payers for services performed.</p> <p>5M. Resolve billing issues with insurers and third-party payers, including appeals and denials.</p> <p>5N. Manage electronic and paper-based medical records.</p> <p>5O. Process office mail and faxes to appropriate staff member.</p> <p>5P. Facilitate/generate referrals to other health care providers and allied health care professionals.</p> <p>5Q. Follow up patient calls and appointment confirmations.</p> <p>5R. Enter information into databases or spreadsheets (for example, electronic medical record [EMR], electronic health record [EHR], Excel, billing modules, scheduling systems).</p> <p>5S. Participate in safety evaluations and report safety concerns.</p> <p>5T. Maintain inventory of clinical and administrative supplies.</p> <p>5U. Activate and facilitate use of patient</p>	<p>k171. Screening methods to identify type of appointment needed</p> <p>k172. Practice management systems and software (for example, EMR/EHR, scheduling software, paper-based filing systems, office storage for archived files)</p> <p>k173. Requirements related to duration of visits (for example, purpose of visit, physician preferences)</p> <p>k174. Sections of the medical record (for example, administrative, clinical, billing, procedural, notes, consents)</p> <p>k175. Required documentation for patient review and signature</p> <p>k176. Chart review</p> <p>k177. Electronic referrals (for example, creation, requirements, administration)</p> <p>k178. Financial eligibility, sliding scales, and indigent programs</p> <p>k179. Government regulations (for example, promoting interoperability/meaningful use, Medicare Access and CHIP Reauthorization Act of 2015 [MACRA])</p> <p>k180. CMS billing and documentation requirements</p> <p>k181. Insurance fundamentals, including revenue cycle and incentive models</p> <p>k182. Insurance terminology (for example, copayment, coinsurance, deductible, tier levels, explanation of benefits, medical necessity)</p> <p>k183. Referral and insurance authorizations, pre-certification requirements (for example, surgical, diagnostics, labs)</p> <p>k184. Diagnostic and procedural codes</p> <p>k185. Third-party payer billing requirements</p> <p>k186. Advanced beneficiary notice (ABN)</p> <p>k187. Aging reports, collections due, adjustments, and write-offs</p> <p>k188. Online banking for deposits and electronic transfers</p> <p>k189. Auditing methods, processes, and sign-offs</p> <p>k190. Data entry and data fields</p>
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<p>portals.</p> <p>5V. Provide technical instruction on the use of telehealth/virtual visits and troubleshoot issues.</p>	<p>k191. Equipment inspection logs, required schedules, and compliance requirements, including inspection by medical equipment servicers</p> <p>k192. Telehealth/virtual visit technologies, barriers to access</p>
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**Domain 6: Communication and Customer Service (12 items)**

Tasks	Knowledge of:
6A. Recognize the diversity of patient cultures and backgrounds when providing care.	k193. Cultural, religious, psychosocial, and economic considerations impacting provision of care
6B. Recognize stereotypes and biases and interact appropriately with patients, colleagues, and others.	k194. Gender identity and expression, pronoun use
6C. Modify verbal and nonverbal communication for diverse audiences (for example, providers, coworkers, supervisors, patients and caregivers, external providers).	k195. Patient characteristics affecting communication (for example, language barriers, age, developmental stage, cognitive, sensory, and physical impairments)
6D. Modify verbal and nonverbal communications with patients and caregivers based on special considerations (for example, pediatric, geriatric, hearing, vision, or cognitive impairment).	k196. Communication styles appropriate to oral, telephone, email, text communications
6E. Modify communications based on type of visit (for example, in-person, telehealth/virtual visits).	k197. Nonverbal cues for in-person and telehealth/virtual communication
6F. Clarify and relay communications between patients and providers.	k198. Communication cycle (clear, concise message relay)
6G. Communicate on the telephone with patients and caregivers, providers, third-party payers using HIPAA guidelines.	k199. Therapeutic communication
6H. Prepare written/electronic communications/business correspondence.	k200. Interviewing and questioning techniques, including screening questions, open-ended, closed-ended, and probing questions
6I. Handle challenging/difficult customer service occurrences.	k201. Scope of permitted questions and boundaries for questions
6J. Utilize conflict management and complaint resolution to improve patient satisfaction.	k202. Active listening techniques
6K. Engage in crucial conversations with	k203. Coaching and feedback, positive reinforcement of effective behavior
	k204. Telephone etiquette
	k205. Email etiquette
	k206. Business letter formats
	k207. Patient satisfaction surveys

<p>patients and caregivers/health care surrogates, staff, and providers.</p> <p>6L. Facilitate teamwork and team engagement.</p> <p>6M. Demonstrate professionalism (for example, appropriate demeanor, clothing, language, tone).</p>	<p>k208. Techniques to deal with patients (for example, irate clients, custody issues between parents, chain of command)</p> <p>k209. Conflict management and dispute resolution methods</p> <p>k210. When to escalate problem situations</p> <p>k211. Incident/event/unusual occurrence reports; documentation of event</p> <p>k212. Cause and effect analysis (for example, risk management related to patient and employee safety)</p> <p>k213. Professional presence (for example, appearance, demeanor, tone)</p>
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**Domain 7: Medical Law and Ethics (7 items)**

Tasks	Knowledge of:
<p>7A. Comply with legal and regulatory requirements.</p> <p>7B. Obtain patient consent as needed.</p> <p>7C. Adhere to professional codes of ethics.</p> <p>7D. Obtain, review, and comply with medical directives (for example, advance directives, living will, health care proxy, medical order for life sustaining treatment).</p> <p>7E. Protect patient privacy and confidentiality, including medical records.</p> <p>7F. Adhere to legal requirements regarding reportable violations or incidents.</p> <p>7G. Identify personal or religious beliefs and values and provide unbiased care.</p>	<p>k214. Laws and regulations (for example, HIPAA, ACA, HERCA, Health Information Technology for Economic and Clinical Health [HITECH], 21st Century CURES Act, Controlled Substances Act)</p> <p>k215. Patient’s Bill of Rights</p> <p>k216. Informed (verbal or written) and implied consent, including consideration for minors and those unable to give consent</p> <p>k217. Advanced directives (for example, living will, do-not-resuscitate/do-not-intubate [DNR/DNI], Medical Orders for Life-Sustaining Treatment [MOLST] form)</p> <p>k218. Power of attorney and legal guardianship</p> <p>k219. Legal requirements related to maintenance, storage, and disposal of records</p> <p>k220. Conditions for sharing information/release of information</p> <p>k221. Criminal and civil acts; medical malpractice</p> <p>k222. Mandatory reporting laws, sign and symptoms of abuse, triggers for reporting, and reporting agencies</p>

