

**NHA Certified Medical Administrative Assistant (CMAA)  
Test Plan for the CMAA Exam**

*110 Scored Items/25 Pretest Items  
Exam Time: 2 hours + 15 minutes*

*\*Based on The Results of a Job Analysis Completed in 2021*

*This document provides both a summary and detailed outline of the topics that may be covered on the CMAA Certification Examination. The summary examination outline specifies domains 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.*

### CMAA Summary Examination Outline

<b>DOMAIN</b>	<b># of Items on Examination</b>
1. Foundational Knowledge	10
2. Communication and Professionalism	21
3. Medical Law, Ethics, and Compliance	17
4. Scheduling	16
5. Patient Encounter	21
6. Billing and Revenue Cycle	11
7. Medical Practice Administrative Procedures and Logistics	14
<b>Total</b>	<b>110</b>

**Domain 1: Foundational Knowledge (10 items)**

Tasks	Knowledge of:
	<p>k1. 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)</p> <p>k2. The relationship between front office and clinical processes and procedures</p> <p>k3. Types of health record (paper or electronic, including app-based/mobile, computer-based, web-based, or cloud-based/online) and implications for use</p> <p>k4. Electronic health record (EHR) and electronic medical record (EMR) components (for example, demographic information, clinical records, medication administration record, diagnoses, laboratory reports, orders, billing information)</p> <p><b><u>Medical Terminology</u></b></p> <p>k5. Spelling, pronunciation, and definition of medical terms</p> <p>k6. Common professional abbreviations and acronyms</p> <p>k7. Acceptable and unacceptable professional abbreviation practices</p> <p>k8. The Joint Commission's (TJC) "Do Not Use" List</p> <p>k9. Prefixes, roots, and suffixes (for example, <i>an-</i>, <i>hyper-</i>, <i>hypo-</i>, <i>cardi/o</i>, <i>vascul/o</i>, <i>-osis</i>, <i>-pathy</i>, <i>-ist</i>)</p> <p><b><u>Basic Anatomy and Physiology</u></b></p> <p>k10. Signs and symptoms of common diseases, conditions, and injuries</p> <p>k11. Anatomical structures, locations, and positions</p> <p>k12. Functions of major body systems</p>

**Domain 2: Communication and Professionalism (21 items)**

Tasks	Knowledge of:
2A Communicate with patients, caregivers, providers, other personnel, and third-party payers.	k13. Communication styles
2B Manage challenging/difficult customer service occurrences and patient interactions.	k14. Nonverbal communication and cues
2C Adapt verbal and nonverbal communication to diverse audiences (for example, patients and caregivers, medical and non-medical personnel, external entities).	k15. Interviewing and questioning techniques (including screening questions, open-ended, closed-ended, and probing questions)
2D Adapt verbal and nonverbal communications with patients and caregivers based on special considerations (for example, language barriers, pediatric, geriatric, hearing impaired, vision impaired, persons with disabilities, health literacy level).	k16. Techniques to appropriately handle difficult situations (irate clients, custody issues between parents, chain of command)
2E Clarify and relay communications between appropriate parties, as needed.	k17. Common barriers to communication (cultural differences, language barriers, cognitive levels, developmental stages, sensory and physical disabilities, and age)
2F Facilitate and promote teamwork and team engagement.	k18. Gender identity and expression, use of pronouns
2G Provide written and verbal instructions for pre/post tests and procedures as prescribed by providers.	k19. Medical terminology and layman's terms
2H Provide patients with information regarding educational and community resources.	k20. Scope of permitted questions and boundaries for questions (questions/discussions between patient and medical assistant that are within scope of practice)
2I Demonstrate professionalism (for example, appropriate appearance, hygiene, demeanor, maintaining professional boundaries, language, and tone).	k21. Active listening
	k22. Empathy and compassion
	k23. Communication cycle (clear, concise message relay)
	k24. Professional presence (appearance, hygiene, demeanor, maintaining professional boundaries, language, and tone)
	k25. When and how to escalate problem situations
	k26. Conflict resolution and de-escalation strategies
	k27. Telecommunications and email etiquette
	k28. Proper use of intraoffice messaging (for example, chat messages, electronic health record [EHR] messaging template)
	k29. Documentation requirements for communication and correspondence
	k30. Available educational and community resources

**Domain 3: Medical Law, Ethics, and Compliance (17 items)**

Tasks	Knowledge of:
<p>3A Ensure compliance with laws, regulations, and guidelines (for example, Occupational Safety and Health Administration [OSHA], The Joint Commission’s National Patient Safety Goals, Centers for Medicare &amp; Medicaid Services [CMS], the Office of the Inspector General [OIG], Americans with Disabilities Act Amendments Act [ADAAA]).</p> <p>3B Maintain confidentiality and security of protected health information (PHI) in compliance with standards and guidelines such as the HIPAA Privacy and Security Rules and organization/facility policy.</p> <p>3C Release protected health information (PHI) in accordance with the HIPAA Privacy Rule and organization/facility.</p> <p>3D Adhere to the Patient’s Bill of Rights (also known as The Patient Care Partnership) including rules regarding consent, the right to go to a medical specialist, the right to keep the same physician or be seen by another physician, the right to a second opinion, medical record ownership, right to refuse treatment, and ADA compliance.</p> <p>3E Adhere to requirements regarding reportable violations or incidents (for example, fraud, security breach, errors in patient care, accidents in the workplace).</p> <p>3F Perform duties within legal scope of practice.</p> <p>3G Adhere to professional codes of ethics.</p>	<p>k31. Basic medical law (for example, patient abandonment, malpractice, negligence, contracts)</p> <p>k32. Patient’s Bill of Rights</p> <p>k33. Health Insurance Portability and Accountability Act (HIPAA) guidelines</p> <p>k34. Penalties for violating HIPAA practices (unknowingly, reasonable cause, willful neglect-corrected, willful neglect-uncorrected)</p> <p>k35. Types of data considered protected health information (PHI) (for example, email addresses, phone numbers, Social Security numbers)</p> <p>k36. Permitted use and disclosure of patient information (for example, medical record access, requirements for release of information, peer-to-peer information sharing)</p> <p>k37. Information that is not private for authorities and health departments (for example, child abuse, STDs/STIs, gunshot wounds, communicable diseases)</p> <p>k38. Procedures to safeguard data (for example, screen savers, password rules, screen visors, mobile device usage policies)</p> <p>k39. Requirements for storage and retention of medical records</p> <p>k40. Consent (for example, expressed, implied, informed, waived)</p> <p>k41. OSHA guidelines (for example, Safety Data Sheets [SDS], Needlestick Safety and Prevention Act)</p> <p>k42. TJC guidelines including National Patient Safety Goals (NPSG)</p> <p>k43. Mandatory reporting laws, triggers for reporting, and reporting agencies</p> <p>k44. Incident reporting requirements (for example, errors in patient care, accidents in the workplace)</p>

	<p>k45. Evacuation plans and emergency procedures</p> <p>k46. Differences between fraud and abuse and reporting requirements including CMS</p> <p>k47. Professional codes of ethics</p> <p>k48. Medical administrative assistant scope of practice</p>
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**Domain 4: Scheduling (16 items)**

Tasks	Knowledge of:
<p>4A Determine optimal scheduling based on considerations such as purpose for appointment, type of service, appointment intervals, provider's preferences, availability, needs, and schedule matrix.</p>	<p>k49. EHR scheduling including templates and techniques</p>
<p>4B Determine appropriateness for a telehealth appointment and, if applicable, provide patient with specific instructions for connection and schedule as telehealth appointment.</p>	<p>k50. Manual scheduling procedures</p> <p>k51. Types of appointment scheduling (for example, time-specified scheduling, wave scheduling, modified wave scheduling, double booking, open booking, block scheduling)</p>
<p>4C Initiate patient registration (if needed) and collect/verify patient information (for example, name, date of birth, insurance, billing address, best method of contact, and accurate contact information).</p>	<p>k52. Considerations for scheduling (for example, new vs. established patient, purpose for appointment, type of service, requested provider, urgency, appointment intervals)</p>
<p>4D Schedule appointments in the electronic health record (EHR) and/or manually.</p>	<p>k53. Provider preferences, needs, and schedule</p>
<p>4E Confirm appointments, monitor patient portal notifications, and provide patient with instructions (for example, bring identification and proof of insurance, copayment requirements, arrival time).</p>	<p>k54. Types of appointments appropriate for telehealth</p>
<p>4F Follow protocols for no-show, missed, cancelled, or rescheduled appointments.</p>	<p>k55. Telehealth platforms and technology</p>
<p>4G Arrange for diagnostic testing and procedures including preauthorization, referrals, scheduling preadmission testing, and schedule follow-up appointments.</p>	<p>k56. Patient portals including notifications, patient self-scheduling, and technical support</p>
<p>4H Conduct pre-appointment screening and confirmation (for example, symptom screening questionnaires, vaccination questions, insurance or health status changes, technology capability, and assistance checks for telehealth).</p>	<p>k57. Procedures used to avoid duplicate electronic health record creation during scheduling (for example, using two patient identifiers, searching maiden and married name)</p> <p>k58. Insurance eligibility and benefits verification</p>
	<p>k59. Information to provide to patient prior to appointment</p>
	<p>k60. Policies and procedures for no-show, missed, and cancelled appointments, including documentation and notification requirements</p>

	<p>k61. Considerations for in-network and out-of-network coverage</p> <p>k62. Pre-appointment screening requirements (for example, symptom screening questionnaires, vaccination questions, insurance or health status changes, technology capability checks for telehealth)</p>
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**Domain 5: Patient Encounter (21 items)**

Tasks	Knowledge of:
<p>5A Welcome and check-in patients, collect/verify identification and demographic information (for example, check ID, address, phone number, date of birth), and make changes as needed.</p> <p>5B Verify insurance information, including reviewing insurance card and coverage benefits, co-payment/coinsurance, secondary or tertiary insurance, or changes in coverage.</p> <p>5C Discuss financial responsibilities of the patient and respond to common questions regarding insurance (for example, copayments, coinsurance, deductibles, allowed amounts).</p> <p>5D Ensure completion of required patient intake forms (for example, assignment of benefits, notice of privacy practices, advance directives, release forms, financial responsibility).</p> <p>5E Generate encounter documentation and verify accuracy of information with patient.</p> <p>5F Ensure all pertinent information has been entered into the electronic health record (EHR), including information from intake forms and test results from previous visits.</p> <p>5G Identify and flag duplicate patient electronic health records that may require merging.</p> <p>5H Conduct patient check-out procedures (for example, provide post-visit summary documents, discuss required follow-up, address patient questions).</p>	<p>k63. How to enter information for new and established patients</p> <p>k64. Required patient intake forms (for example, assignment of benefits, notice of privacy practices, advance directives, release forms, financial responsibility)</p> <p>k65. Special considerations and accommodations related to the intake process (for example, visually impaired, language barriers, support for use of kiosks, tablets, or other intake technology)</p> <p>k66. Identification, demographic, and insurance information verification processes and procedures</p> <p>k67. Referral, precertification/preauthorization, and predetermination requirements</p> <p>k68. Basic recognition and purpose of code sets (ICD-10-CM, ICD-10-PCS, CPT, HCPCS)</p> <p>k69. Concepts related to medical necessity</p> <p>k70. Procedures used to identify and avoid creation of unnecessary duplicate electronic health records (for example, using two patient identifiers, searching maiden and married name)</p> <p>k71. Procedures to follow if duplicate health record is identified (for example, notify appropriate staff, determine if merging is required)</p> <p>k72. Acceptable secondary health records (for example, workers' compensation, liability)</p>

	<p>claims, minors' rights)</p> <p>k73. Commercial insurance plan types (for example, employer-sponsored, health maintenance organization [HMO], preferred provider organization [PPO])</p> <p>k74. Government insurance plans (for example, Medicare, Medicaid, Medigap, TRICARE)</p> <p>k75. Insurance rules (for example, dependent and birthday rules, coordination of benefits)</p> <p>k76. The difference between copayments and coinsurance</p> <p>k77. Advanced Beneficiary Notice (ABN)</p> <p>k78. Contents of an Explanation of Benefits (EOB)</p> <p>k79. Electronic remittance advice (ERA)</p> <p>k80. Procedures for telehealth appointments, including troubleshooting and support</p>
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**Domain 6: Billing and Revenue Cycle (11 items)**

Tasks	Knowledge of:
6A Prepare documentation for billing.	k81. Phases of the revenue cycle and how they interact/impact each other
6B Perform charge reconciliation (for example, correct use of electronic health record software, entering charges, posting adjustments, accounts receivable procedures).	k82. Health care payment models (for example, fee for service, value-based plans)
6C Bill patients, insurers, and third-party payers for services performed.	k83. Financial eligibility, sliding scales, and indigent programs
6D Perform payment collection (for example, copays) and create statements.	k84. The difference between Medicare and Medicaid
6E Support resolution of billing issues with insurers and third-party payers, including appeals and denials.	k85. CMS billing and documentation requirements
	k86. Aging reports, collections due, adjustments, and write-offs
	k87. Third-party payer billing requirements
	k88. Referral and insurance authorizations
	k89. Clearinghouse and claim scrubbing processes

**Domain 7: Medical Practice Administrative Procedures and Logistics (14 items)**

Tasks	Knowledge of:
<p>7A Manage and review medical records to ensure records are secure, complete, up-to-date, and sign-off has occurred.</p> <p>7B Perform financial procedures, such as management of petty cash and end-of-day financial reconciliation.</p> <p>7C Perform opening and closing procedures, including enabling/disabling answering service, checking messages, allowing time for system updates, preparing medical records for the day, planning for daily activities, turning equipment on/off, cleaning reception area, and stocking supplies.</p> <p>7D Verify contents of deliveries and sort and distribute to appropriate recipients.</p> <p>7E Manage inventory of administrative supplies and complete required documentation.</p> <p>7F Follow proper telecommunications procedures, including introduction of organization/facility and self, identification of caller needs, management of hold times, and directing calls to proper parties when needed.</p> <p>7G Create correspondences using templates, proper greetings and salutations, proper postage, and required signatures.</p> <p>7H Demonstrate basic computer skills including use of email, word processing, spreadsheets, internet, and hardware (for example, copiers, fax machines, scanners).</p>	<p>k90. Organization/facility policies and procedures</p> <p>k91. Filing systems (for example, alphabetical procedures, color procedures, terminal digit procedures, such as primary, secondary, and tertiary)</p> <p>k92. Petty cash management and end-of day financial reconciliation requirements</p> <p>k93. Organization/facility opening and closing procedures</p> <p>k94. Telephone procedures including introduction of facility and self, identification of caller and their needs, management of hold times, and directing calls to proper parties when needed.</p> <p>k95. Types of letters and templates</p> <p>k96. Proper greetings, salutations, and signatories</p> <p>k97. Basic computer skills including use of email, word processing, spreadsheets, internet/intranet, and hardware (for example, copiers, fax machines, scanners, electronic signature pads)</p> <p>k98. Americans with Disabilities Act Amendments Act (ADAAA) compliance procedures (for example, remove barriers, ensure policies and practices do not discriminate)</p> <p>k99. Inventory management requirements</p> <p>k100. Data storage and back-up requirements</p> <p>k101. Downtime procedures to implement when technology or systems are not functioning properly or are otherwise unavailable to users</p>