Lesson 1

The World of Health Care

Step 1  Learning Objectives for Lesson 1

When you have completed the instruction in this lesson, you will be trained to do the following:

- Describe medical personnel and their role in quality health care.
- Describe the average day of various healthcare professionals.
- Describe the personal qualities of a healthcare professional.
- Describe the desirable character traits of a healthcare document specialist.

Step 2  Lesson Preview

Welcome to the exciting world of the healthcare document specialist.

You have also chosen a terrific time to enter the healthcare industry. Healthcare, in general, has been—and continues to be—one of the fastest-growing employment industries in the United States. Economists and staffing experts claim that while other industries are cutting back and laying off employees, the healthcare industry is in dire need of workers. In fact, the healthcare industry will add 20.5 million new jobs between 2010 and 2020—more than any other industry, according to the U.S. Bureau of Labor Statistics.¹ Not only will the demand for healthcare professionals increase but the earnings potential is excellent.

The healthcare document specialist plays a vital role in the medical profession, and we have written this program to help you be successful. The program will show you how to manage patient records through transcribing and editing medical reports, coding insurance bills and billing medical insurance companies. You will also learn medical terminology, how to work with electronic healthcare (or medical) records and anatomy and physiology.

¹ We know you are ready to learn, and we are ready to teach you.
You will learn how to work with today’s technology—using software programs for billing, coding, transcription and editing and electronic health reports. You will have the knowledge you need to find the job you want. And when you are ready to find that job, we are here to help. We offer graduate assistance to every student who completes our programs. We teach you how to market yourself and how to prepare for your new career. We know you are ready to learn, and be assured that we are ready to teach you—from the very first page until you graduate and are working in the field, we are dedicated to your success.

Now let’s talk a little bit about how your program is organized. Your program is divided into courses, which are then divided into lessons. Each lesson contains skills that you will master on your way to graduation. The lessons are easy to follow and offer step-by-step instruction to make learning simple—even fun!

Each new lesson will begin with Learning Objectives and a Lesson Preview. The Learning Objectives tell you what you should learn by the end of the lesson, and the Lesson Preview provides a brief description of the lesson. From there, you will read new material and complete Practice Exercises. This combination of new material followed by a review may repeat two or more times per lesson. This format helps you apply what you learn and retain the information.

Finally, you will take a graded Quiz periodically in the program. Quizzes highlight what’s important in the program. You will know many of the items on the Quiz without looking back at the lesson. However, if you don’t remember or aren’t sure of an answer, you can find the information in your lesson. All of your Quizzes are open book! We want you to learn how to use your resources to find the right answer rather than memorize the material.

If you have questions about any part of the program, feel free to contact an instructor. The instructional faculty is available to make your trip through this material enjoyable and rewarding.

In this first lesson, you’ll study the key players in the healthcare field. You’ll look at a typical day in the life of several healthcare professionals. Finally, we will look at the personal qualities, teamwork and character traits of a successful healthcare professional. Before we do, let’s review how to set goals and manage your time during your studies and in your new career.
Studies prove that people who set a series of smaller, short-term goals achieve their dreams more often than those who only set long-term goals. Let’s take a few moments to consider a few, shorter-term goals—in addition to the date you have in mind to begin your new career as a healthcare document specialist!

Take a few moments to set some short-term goals. For instance, consider submitting your first Quiz today... you can even get instant results on your first Quiz by submitting your Quiz online—or call the school and submit your answers over the phone! Set a goal to complete the first three Quizzes by a certain date. Or commit to a specific date to complete Course One, for example. Whatever goals you decide on, do what works for you—make your goals realistic yet challenging.

Just think...in a matter of only a few weeks, you could be working on Course Two! The timeline and choice are yours; only you know what will work best for you.

Yes, you can study at your own pace. It’s not necessary to blaze through a course on your way to earning your Healthcare Document Specialist certificate. In fact, you could read only one lesson a month if you really wanted to. But is that a good idea? Do you think that you would remember what you learned each month and be able to build upon it? When it’s time for a Quiz, you’d probably have to put in a lot more study time if you used that approach!

One helpful success strategy is to complete your program planning sheet that follows. A program completion planning sheet can help you reach your goal of earning your certificate. Take a minute each day to review your reasons for wanting to earn your certificate. This strategy will help you stay focused on your goal, as well. Simply list your reasons for wanting to complete your Healthcare Document Specialist program. Then list the dates by which you would like to complete each course.

On your planning sheet on the next page, list the target dates that fit best with your plans. After you create your program completion planning sheet, refer to it often to remind you of your goals!
Program Completion Planning Sheet

I would like to gain the skills this program has to offer because:

1. __________________________________________________________
2. __________________________________________________________
3. __________________________________________________________

My goals are to complete:

Course 1 by ________________________________
Course 2 by ________________________________
Course 3 by ________________________________
Course 4 by ________________________________
Course 5 by ________________________________

Once you’re happy with your goals, copy them onto the Program Completion Sheet in your Program Introduction. This way you can post your short-term goals on your fridge or bathroom mirror where you will see them often. And as you achieve each goal, take pleasure in checking that goal off your list. Also, reward yourself for a job well done. Take a special walk, relish your achievements with your favorite tea or coffee, or give a friend a call and have a spontaneous, picnic lunch! Each small goal achieved is worth celebrating...and gets you yet another step closer to your new career and lifestyle goal!

To celebrate meeting a goal, you can make a special lunch date with family or friends.
Step 4  Time Management

Now, what about time management to help you meet your goals? Well, there’s no denying that time is a valuable resource. We all share the same amount of minutes and hours available each day. Since you cannot change this fact or borrow time from previous days, all that you can do is use the time wisely. Time management consists of effectively and efficiently organizing yourself to make the best use of the time available and making the choices most appropriate for you. Let’s clarify the difference between effectiveness and efficiency. Selecting the right task demonstrates effectiveness, allowing you to work smarter by working on what is important, and efficiency describes finding the best methods to complete that task.

To better learn to manage your time effectively, identify and set daily goals. Write down your daily goals to make them more visible to you and increase your commitment to them. Time management consultants agree that a daily to-do list is invaluable. Make your list a regular part of your routine. List all of the activities that you want to accomplish that day and rank them by level of importance. The ranking order works well because you rank the activities that allow you to achieve the most important goals first.

One of the most essential tools for effective use of time is a schedule. To begin working on a schedule, set aside a period of time each day to reflect and plan. This brief time spent each day will save you hours in the long run. Also, estimate in advance how much time a particular task will take. For example, pretend you set a goal to successfully finish a particular Quiz by the end of the week. You estimate it will take you six hours to prepare for and complete the Quiz, and you estimate you have two hours available for schoolwork each day. You don’t want to wait until your goal completion date to begin the Quiz because somehow you will be trying to pack six hours of work into two hours. If you do this, you will not meet your goal—either you will not complete the Quiz or you will rush through the assignment and not perform as well as you originally hoped. And don’t forget to schedule time for breaks and relaxation!

The final step in planning your work is to work your plan. Keep your schedule visible as a reminder of your goals. To finalize your scheduling, keep track of your progress toward a particular goal, and record your accomplishments.

Regardless of how well you plan your goals and schedule your time, you will inevitably run into obstacles. That’s OK—you can conquer these obstacles.

One such obstacle stems from overcommitment. By spending time on what others want, you become unable to concentrate on your own goals. Many individuals do not know how or are afraid to refuse a request. Remember, your goals are important, and it’s okay to politely refuse requests that are not in your best interest!
Another obstacle you may encounter is an inability to delegate, or entrust tasks to others. However, delegating is a key concept in successful time management. If you don’t delegate, the result is less time spent on the critical tasks that need your attention. You often perform activities at work and home out of habit. Try this technique: Whenever you face a task, ask yourself if someone else can handle it. Think about it. Can your daughter throw in a load of laundry while you study? Can your husband drive your son to basketball practice while you work on a Quiz? Probably. So ask them to do so!

Keeping an orderly desk can also help you manage time. Your desk can and should be a tool to make you more effective. Michael LeBoeuf, author of *Working Smart*, offers some guidelines for this topic. For example, keep only one project at a time on top of your desk, making that project your top priority. If you have a school Quiz to finish, that should be the only item on your desk. Also, keep items off your desk until you are ready for them. And don’t be sidetracked by other tasks because they are easier or more appealing. Sure, maybe Lesson 8 of your course material seems more interesting than Lesson 5, but you should work on the top priority item—Lesson 5—and continue working on it until completion. When you complete a task, send it on its way. Then check your priorities, and move to the next item. Time management consists of simply organizing yourself to make the best use of the time available.

Everyone has the same amount of time available. What you do with that time is up to you to decide. Some people, through successful time management principles, make the most of their lives and create greater personal satisfaction for themselves and those around them. So, give a few of these time management ideas a try!

**Set a Schedule and Stick to It**

When we talked about time management, we talked about the importance of scheduling. Well, creating a schedule for your studies is an important success strategy. You can create a weekly organizer, and fill in the days and dates.

Each week, write in all of your nonnegotiable commitments for the week, such as when you’re at your job or busy with your family. Then, find time slots that won’t be interrupted. Write STUDY TIME in big red letters across these times. Highlight them. Put stars by them. Do whatever it takes to keep these appointments. And remember to check your calendar often. Here’s a sample weekly organizer that you can use as a guide.
In addition, you should study somewhere that is quiet, comfortable and well-lit. Do not allow yourself to be distracted, and schedule study times when you are alert and likely to be at your best. Lastly, your study sessions don’t have to be marathons, but you should make studying a part of your daily routine.

So there you have it. You know all about success strategies and how these strategies can help you reach your goals. Remember to put what you’ve learned here to use. These success strategies have proven to be a great help to students—that’s why they’re called success strategies! So take advantage of them. Use them to help you succeed at being a good student, earning your certificate, starting a new job and doing well in your career!

Now that you can manage time, let’s look at motivation.
Step 5 Stay Motivated

As you learned earlier, you can set goals and establish a study schedule to aid in your success. It also helps to stay motivated. To keep your motivation up, study a little bit every day so that your momentum moves forward. In addition, completing the Practice Exercises will help you complete upcoming Quizzes. We want to help you succeed, and want to see you finish your program.

The most important factor in motivation is you! You are your own best motivator, so realize what motivates you to study. Perhaps your goal is to start a new, successful career, or start your own work-at-home business. It’s helpful to know what drives you, so you can determine how to get there.

Set smaller goals (daily, weekly and/or monthly) that can help you reach your larger goals. If you want to run a marathon, you don’t decide one day to run 26 miles. Instead, you set smaller, short-term goals that will help you run a marathon. You run a few miles each week and continue to add miles as you train. The same applies to your life—set smaller, short-term goals that will lead to your overall goal.

Another factor in motivation is procrastinating. Avoid procrastination! Keep going forward and completing each lesson, Practice Exercise and Quiz as you reach it. Each small goal will help you complete your larger goal—starting your new career. When you finish one lesson, preview the lesson objectives for the next lesson or begin reading your next lesson to keep up your momentum.

Sometimes it helps to talk with a mentor or a friend. A third person can support your goals, cheer for your progress and encourage you to do more. And remember, our instructors are only a phone call or e-mail away and are always happy to help!

Step 6 Teamwork in the Healthcare Profession

Now that you have some tips for staying motivated under your belt, let’s identify some of the key players in the healthcare profession and elaborate on what they do. In most professions, success comes from a team of people working together to accomplish goals. In medicine, physicians certainly cannot perform their jobs alone. Many people work hard, some behind the scenes, others more visibly, to ensure that our healthcare system runs properly. When you go to see the doctor, you don’t just see the doctor. You might see a number of professionals, including a receptionist or an office manager. Throughout a visit, a doctor may talk to several staff people; all of these people are essential members of the medical care team.
Physicians

Physicians or doctors are the most prominent members of the medical care team. They perform life-saving procedures. They cure the sick and help heal wounds. Becoming a doctor of medicine is one of the most challenging career paths a person can choose. Not only do physicians earn four-year college degrees, but they also must complete medical school and one or more residency assignments. During residency, 85- to 100-hour work weeks are common. Because of this huge commitment, doctors deservedly receive much of the attention in the medical field.

Let’s look at a medical service from the physician’s point of view.

Dr. Green is a physician who works at Weston Medical Clinic. He sees his first patient, Hannah, at 8 a.m. He examines Hannah, a woman in her mid-30s, complaining of pain to her right arm. A concise statement that describes why a patient is seeking treatment is called the chief complaint. Dr. Green documents the patient’s description of the development of the condition. Then, Dr. Green asks a series of questions to identify signs and symptoms that Hannah may be experiencing.

Next, Dr. Green does an examination and documents the objective findings. After the exam, Dr. Green recommends that x-rays be taken. The x-rays indicate a fracture. The physician’s opinion about what is wrong with the patient or what is causing the patient’s complaint is the diagnosis.
Finally, Dr. Green puts her arm in a cast, which is a procedure. A procedure is anything the physician does to determine a diagnosis and help the patient heal.

This sequence began with a complaint—“my arm hurts”—and was followed by a history and exam to determine the diagnosis aided by tests—a broken arm as seen on the x-ray. The sequence is completed with a service or procedure—the fracture care. Doctors perform one or more of these steps with every patient they see. And every time a doctor or nurse performs these duties, the steps must be recorded into the patient’s medical record. The diagnosis and procedure, along with any tests done, eventually are transcribed, coded and billed by you, the healthcare document specialist! You will learn all about coding, billing and transcribing the diagnoses, procedures and services as you move through this program.

After Dr. Green dismisses the patient, he records some notes about the encounter. Dr. Green also makes some notes on the patient’s history or chart. Now he is ready to see his second patient.

In summary, physicians diagnose illnesses and injuries. They prescribe drugs to alleviate symptoms, treat conditions and ease pain. They rely on their training to make quality, accurate decisions. However, as good as physicians are, their staff ultimately supports them as they provide quality treatment. Nurses are one essential part of the medical staff.

Nurses

As professionals who perform a variety of tasks in the medical world, nurses often must follow through with treatments physicians prescribe. Nurses can give injections and check a patient’s vital signs, as well as assist in surgery. It’s also true that nurses must often do the thankless jobs—cleaning up exam rooms and organizing supplies.

Without nurses, the number of patients a doctor sees in a day would drop dramatically. Nurses allow doctors see more patients and are able to focus on those patients who require the most care.
Nurse’s and Physician Assistants

Two other categories of personnel in the medical field are nurse’s and physician assistants. Nurse’s assistants, or nursing aides, help nurses with daily duties, such as paperwork, general organization, and taking a patient’s temperature, weight and blood pressure. Some nurse’s assistants also talk to patients and make sure they’re comfortable.

Physician assistants or PAs normally are under the supervision of a doctor and can perform some of the same functions as a doctor. PA duties might include stitching up a cut, taking a patient history and even performing lab work.

Emergency Personnel

Emergency personnel are a group of professionals with the sole responsibility of providing immediate medical assistance and transporting the patient to the hospital for treatment. When someone is hurt and needs an ambulance, these people respond. Police officers, firefighters and other rescue professionals all have some level of medical training.

You have probably heard of emergency medical technicians (EMTs) and paramedics. EMTs take classes that enable them to stabilize patients who have a wide variety of emergency medical conditions. They are often members of ambulance crews and volunteer fire-fighting organizations. Paramedics have more training than EMTs. Paramedics are not only able to stabilize patients, but they can also begin treatments to cure patients, such as administering medication.

Support Staff

Physicians and nurses rely heavily on support staff to keep a medical office or clinic running smoothly. As you might guess, each of these positions plays an important role in the medical world.

Office Professionals

Office professionals include office managers and receptionists. Without this staff, many medical offices would grind to a halt! These people organize schedules, record appointments and answer patient questions. Office staff members have terrific communication and organization skills. They also must make a good first impression. The office manager may be the first person a patient sees upon entering a medical office, and the manager’s attitude can mean the difference between a pleasant visit and a nightmare for the patient.
Medical Transcriptionists and Editors

Do you remember when the doctor in our previous example recorded some notes about a patient encounter? Well, that dictation went to a **medical transcriptionist** who listened to the doctor’s dictation and typed what she heard. This then was added to the patient’s medical record. By using transcriptionists, doctors save time by speaking their notes. Some medical transcriptionists also serve as **medical editors**. **Medical editors** listen to the doctors’ spoken notes while editing rough reports that a speech recognition program produced based on the doctors’ dictation.

Look at the following examples of transcribed reports. We’ll discuss medical records in more detail later in this course.

A medical transcriptionist listens to the doctor’s dictation and types what she hears.
Transcribed Report Example One

Name: Laura Brown  
#030311

PROBLEM
Upset stomach with vomiting and fever.

SUBJECTIVE
The patient is a 22-year-old female. She went to breakfast with her friends earlier this morning. She ordered a cream-filled pastry with her coffee. She stated that no one else had a pastry. About 4 hours later, she started having an abrupt onset of nausea, vomiting, abdominal cramps, diarrhea, headache and a slightly elevated fever. Since she had the symptoms for over 3 hours, she called her family physician and was able to see him this afternoon.

OBJECTIVE

ASSESSMENT
Staphylococcus toxin gastroenteritis.

PLAN
The patient was sent home and told to get plenty of bed rest and begin clear fluids when nausea and vomiting cease. If the symptoms continue for more than 3 more hours, she should contact the office.

__________________________
Robert Snow, MD

D: 02-08-20xx
T: 02-08-20xx
RS:CJL
Transcribed Report Example Two

Name: Johnny Cruz  
#249315

PROBLEM  
Sore throat with fever.

SUBJECTIVE  
Johnny, a 5 year old, presents to his pediatrician with a sore throat, fever, loss of appetite and a headache. His mother said that he has been on the couch all morning and refuses to eat or play.

OBJECTIVE  
After examining the patient, the doctor reports enlargement of the lymphatic glands and a temperature of 103 ºF. The oral exam reveals a swollen, bright-red throat. A throat culture is positive for strep throat.

ASSESSMENT  
Acute follicular pharyngitis (streptococcal sore throat).

PLAN  
Take erythromycin as directed. Temperature to be taken frequently. Children’s Tylenol every 4-6 hours as needed for fever. Encourage bed rest, modify activities, and increase fluid intake. All citrus juices should be avoided until symptoms subside. Call office if symptoms persist.

______________________________  
Marikit Makabuhay, MD

D: 09-15-20xx  
T: 09-15-20xx  
MM:BDD
Medical Coding Specialists

**Medical coding specialists** assign medical codes to the information obtained from a patient’s visit to a medical facility. Each patient’s diagnosis, treatment and tests must be coded. The medical coding specialist gets the medical report that the physician dictated and that the transcriptionist created. This employee examines the diagnosis and the treatment performed and assigns codes to each one. To code, the medical coding specialist looks up the information in a reference book and finds the right set of numbers that describes exactly what occurred during the patient’s visit.

Medical Billing Specialists

*Medical billing specialists* are a perfect example of how interrelated one job is to the next in a medical office. Remember, medical coding specialists assign appropriate codes describing what occurs during a patient’s medical visit, while **medical billing specialists** use the codes that a medical coder assigns to complete the insurance forms. These forms are necessary to collect payment from the insurance companies. Billing specialists know that the provider doesn’t get paid unless the form is completed and filed correctly.

Now that you know the job duties of many of those in the healthcare world, let’s look at the day in the life of several healthcare professionals.

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**Step 7 Healthcare Professionals**

Now that you know a bit about team players involved in healthcare, let’s build on that knowledge. We’ll take a look at three different healthcare professionals, following them through a portion of a day so that you can get an idea as to the environments they work in and the tasks they must complete. Keep in mind that these are very general examples. However, as a healthcare document specialist, you will be able to perform the work of these professionals!

**Medical Transcriptionist/Editor**

Taylor is the medical transcriptionist and editor for Weston Medical Clinic and has worked as a medical transcriptionist for about 10 years. Before Weston, she worked with a transcription company that had several doctor’s offices and medical facilities in different parts of the country. Taylor has seen the change in the medical transcription field and has moved from transcribing audio tapes from offices in her area to transcribing digital sound files for facilities in other states. Now she works from home as a medical transcriptionist and editor for Weston Medical Clinic. Let’s take a look at a typical day for Taylor.
Taylor wakes up and heads downstairs to her home office by 8 a.m. Taylor logs onto the shared drive to which all the transcriptionists have access. Every doctor at the clinic has a folder on the shared drive. Each physician carries around digital hand-held devices and dictates information directly into it. These sound files are then loaded onto the shared drive and saved into the corresponding doctor’s folders. Taylor opens up one of the sound files that she needs to transcribe. She uses a special program that is connected to the patients’ electronic health records (EHRs), which are computerized medical records. After Taylor is finished typing it, she saves it to the patient’s chart on the computer and moves the sound file into a folder for the finished reports. Once the transcribed report is saved in the patient’s chart, it goes back to the physician for a signature. The physician opens up the report and signs it electronically. Then Taylor is ready to start another report!

Some of Taylor’s doctors use speech recognition technology (SRT)—which we’ll discuss later in your program—to transcribe reports. The SRT program takes the physician’s dictation and creates a rough report. Taylor listens to the dictation and follows along with the report to make sure it’s accurate. Additionally, Taylor edits as necessary and puts the report in the correct format.

Taylor appreciates this technology because she doesn’t have to type all of the physician’s notes, and it has created a new role for transcriptionists. Most of the time, Taylor only has to alter portions of the report as she carefully edits it. Taylor also appreciates the time the technology saves; she can work from home because she can access the files and programs she needs electronically!

**Medical Coding Specialist**

Marge is the medical coding specialist for Weston Medical Clinic. Like Taylor, she works at home. After getting her children off to school and refreshing her cup of coffee, Marge heads to her home office, ready to start her day! At Weston Medical Clinic, the coding specialist is one day behind the reception area. For instance, the medical coding specialist works on Tuesday’s dictations on Wednesday, Wednesday’s dictation on Thursday and so on.

Marge logs onto her computer with her password and downloads the dictation that Taylor created and saved to the EHR. Marge spends most of the remainder of the day reading the dictation to assign the correct diagnoses and treatments. You will learn how to determine the correct diagnosis and procedure codes later in this program. After assigning the codes to a record, Marge saves the EHR and moves to the next record.

Just before her children arrive home from school, Marge receives a phone call from Joann, Weston Medical Clinic’s billing specialist. Joann has received denial for a claim and asks Marge to pull up the dictation to check for accurate coding. Marge reviews the record and notes the numbers for the code were transposed. She provides the correct code for Joann to resubmit the claim.

By the end of the day, Marge has completed the coding for all of the services performed at Weston Medical Clinic the previous day.
Medical Billing Specialist

Joann is the billing specialist for Weston Medical Clinic. She usually starts the day by going through the claims that are still outstanding, which are bills that haven’t been paid yet. For this clinic, most of these outstanding claims are waiting for insurance payments. The others are due either from patients who don’t have insurance or from patients who need to pay the remaining portions of the bills that their insurance policies did not cover.

A few of the insurance claims are late in being paid, so Joann starts calling the individual insurance companies, trying to track down each claim. It takes two hours for her to work through 10 claims. This type of follow-up is very important for the clinic. It prevents any claim from “slipping through the cracks” of the insurance world. After getting a better idea of when to expect payment for the 10 claims, Joann works on the individual claims or those that have a balance due from the patient.

Joann checks the individual claims for the time of notification to determine how long it has been since each person received the bill. She marks those that are 60 or more days past due. These people will soon receive another reminder requesting payment.

Finally, Joann is ready to work on creating claims for the services that have been coded by Marge. Joann checks the patient information to make sure that the patient included all necessary information, including the name, address, insurance company and policy number. After making sure all the information is correct, she transfers the codes to an insurance claim form, most commonly a CMS-1500. You will learn how to fill out this form later in the program. By 4:30 p.m., Joann has processed the claims. They will be submitted to their respective insurance companies, and the clinic waits for payment.

By reading about the work of medical transcriptionists and editors, coders and billers, you now have an idea of what a healthcare document specialist does every day. Let’s continue by studying some general responsibilities of the healthcare document specialist.
Step 8  Responsibilities

You just read about the work of medical coders, billers and transcriptionists and editors. Keep in mind that as a healthcare document specialist, you may perform any or all of the same tasks as these professionals, making you a triple-threat when it comes to finding employment! So, as healthcare document specialist, you have five basic responsibilities:

1. Transcribe/Edit Dictation.
   As a healthcare document specialist, you will create dictation by transcribing digital voice files into dictation, or by editing text that has been created by computer software systems.

2. Code Dictation.
   Once the dictation is complete, the healthcare document specialist will read the dictation to determine the diagnoses and procedures that apply. Reference manuals are used to assign codes to represent the diagnoses and procedures.

3. Complete and Submit Insurance Claim Forms.
   Using the codes obtained from the reference manuals, as well as patient and physician information, you will complete and submit the appropriate insurance claim form.

4. Follow Up on Claims and Bills.
   After you submit the insurance claim form, you might need to contact the insurance company regarding the claim. You might also need to follow up with patients to secure payment.

   After the primary insurance carrier has paid its share of the bill, if the patient has secondary insurance, you will submit a bill to the secondary carrier. If the patient does not have secondary insurance, then the patient may be responsible for paying whatever remains after the primary carrier has paid.

Let’s pause and complete a quick Practice Exercise.
Step 9  Practice Exercise 1-1

Select the best answer from the choices provided.

1. The ____ is usually the first person in the doctor’s office to see a patient.
   a. office manager
   b. doctor
   c. EMT
   d. healthcare document specialist

2. When the patient tells the doctor what’s wrong, the information is called the ____.
   a. diagnosis
   b. problem
   c. chief complaint
   d. procedure

3. An outstanding claim is one that ____.
   a. the insurance company has paid
   b. has multiple charges
   c. is filled out correctly
   d. hasn’t been paid yet

Answer the following question.

4. Describe the five basic responsibilities of a healthcare document specialist.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Step 10  Review Practice Exercise 1-1

- Check your answers with the Answer Key at the back of this book. Correct any mistakes you may have made.

Step 11  Personal Qualities

- If you think about it, there are a large number of potential clients available in most towns. Even small towns usually have one or two practices and a hospital. Many times qualified help is hard to find, and because you have a skill that is in great demand, you have the opportunity to make good money. Though salaries vary depending on experience, the number of hours worked and location, we think you’ll be pleased to discover the amount of money you can earn as a healthcare document specialist. And remember that as your experience builds, you can add to your earnings while being a vital part of a medical team and doing work that helps people.

The main thing to remember when you approach a potential client or employer is that you are the best healthcare document specialist for the job. Your competence means money to your employers! You should remember and practice three qualities: professionalism, presentation and adaptability.

Professionalism

Professionalism is the conduct, aim or qualities that characterize a profession or professional person. As with any business, the image you project is important. You must be professional. Professionalism includes how you dress, talk and interact with your clients. When you have an initial meeting with potential clients, your level of professionalism will affect their impression of you.

When you select what to wear, be conservative but not bland. Your attire should be clean, wrinkle-free and professional. Try to choose something you feel comfortable wearing. If you are comfortable, you will be able to concentrate on other important things, such as your presentation and answering any questions your potential client may have. An uncomfortable outfit, whether in style, color or both, will distract you.

Let’s look at the following example to see how professionalism affects our choices.

Jane entered the Haber Dash Men’s Store to exchange a tie for her husband. As she approached the counter, she saw that two clerks were at either end. She noticed that one clerk wore a t-shirt and torn jeans and had a few visible piercings. The other clerk was dressed conservatively in black pants, a starched white shirt and a snazzy bow tie. In a split second, she decided who looked the most helpful. She thought the conservatively dressed clerk would be more sympathetic to her tie dilemma, so she approached him for assistance.

The image you project is important.
Has this ever happened to you? Perhaps if Jane wanted advice on which CD to buy for her son, the other clerk would have appeared more competent. While it may not be fair, Jane made a judgment based on how each employee looked. Of course, no two people look alike, but there are certain factors of appearance that are important in the work setting. This is especially true for a professional healthcare worker.

Another facet of professionalism is delivering what you promise. You’ve probably heard the saying, “Five minutes early is 10 minutes late.” Basically, this means if you have a meeting at 10 a.m., be 15 minutes early. Never be late, especially for a first-time interview. Such promptness shows you are responsible and considerate. If your client is a little late, be understanding. Just make sure you aren’t the tardy one. When you are asked for work samples, be prepared. Explain what you know and how you gained your knowledge. If you ever are asked to complete a test task, do so promptly.

**Presentation**

*Presentation* is the act of bringing or introducing something into the presence of someone else. Often your initial presentation will decide whether you gain a client or employer. In addition to being on time and dressed properly for the meeting, your presentation can go a long way in influencing your client-to-be—both positively and negatively.

Be sure to present a confident image. Your attitude should say, “I know what I’m doing” without being arrogant or condescending. Remember, this is the client’s money you’re talking about. Confidence is a must!

**Adaptability**

*Adaptability* is the ability to be modified, or changed. To be successful, you must be able to adapt for each client. Some people want tasks done a certain way. Others may have exactly the opposite requirements. Codes are updated annually. Insurance regulations change. Forms are altered. If you get too set in your ways, you might lose clients who require slightly different approaches.
Step 12  Character Traits

What makes a top-notch healthcare document specialist? Let’s examine some of the most important character traits of a healthcare professional. You’ll be able to boast about these traits by the end of your program!

Curiosity and Drive

A healthcare document specialist needs to have a true interest in the healthcare field. You demonstrated an interest by enrolling in this program! This includes the constant desire to follow the ever-changing face of medicine. As you progress in your field, be willing to open your mind to new information to learn new skills and change your life.

Warmth and Confidence

A healthcare document specialist appreciates the satisfaction of caring for others. You may interact with other people, such as coworkers, doctors and patients, and you can do so in a courteous, pleasant manner. Showing warmth and compassion will put patients at ease. You may be the one assigned to explain the coding and billing process, as well as insurance denials. As you begin your career, be confident in your abilities and understanding of the information you’re explaining.

You can put a patient at ease by showing warmth and compassion.
Organizational and Professional Skills

A successful healthcare professional is a multi-tasker because she handles several responsibilities at once. Remember to make lists of things to do so you don’t forget any of your tasks for the day. As you start working, you’ll learn to keep charts and other paperwork organized so that you can find what you need at a moment’s notice. You’ll also realize that it’s important to keep your work area clean and tidy so there’s room to work and you don’t lose things. It’s also important to be able to prioritize, or decide which duties are most urgent. “Should I code Mrs. Smith’s record first, or should I follow up on insurance payments?”

As a healthcare document specialist, it’s important to keep organized and to prioritize. Let’s keep moving!

:**Step 13 Practice Exercise 1-2**

- Determine the best answer to complete each sentence.

1. A healthcare document specialist should exhibit three personal qualities: ____________, ____________ and ____________.

2. The ________________ you project is important.

3. Handling several responsibilities at once is termed ________________.

4. ________________ is the ability to be modified or changed.

Write your answer in the space provided.

5. Explain the most important character traits of a successful healthcare professional.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Step 14 Review Practice Exercise 1-2**

- Check your answers with the Answer Key at the back of this book. Correct any mistakes you may have made.
Healthcare Document Specialist

Step 15 Lesson Summary

Healthcare document specialists are an important part of any medical setting because they are able to perform everything from coding and billing to transcription and editing. This lesson gave you a firm understanding as to what healthcare document specialists and other members of the healthcare team do. You'll work with physicians, nurses, office managers and others to contribute to the best possible patient care.

We also discussed a few important points for you to remember as you move toward your new career. You learned the importance of professionalism, presentation and adaptability. Lastly, this lesson discussed the character traits of a successful healthcare document specialist.

As you continue with this program, you'll see in greater detail just how important healthcare document specialists are to those who work in and rely on medical facilities. This career is in demand! By choosing this program, you have started on an exciting path toward success.

Congratulations—you are now ready for the next lesson in this course!

Endnotes

Great Start to the Course!

Each lesson you complete is one step closer to your new career.

Time for the next step!

You’ll soon develop a better understanding of insurance terminology, and learn about the tools of the trade.

Continue to Lesson 2.