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| WI Youth Apprenticeship Logo | Medical Office  Youth Apprenticeship |

# MEDICAL OFFICE

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

**Length of Apprenticeship:** One year

# required Competencies

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

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

# Registered Apprenticeship Bridging Opportunities

The following Registered Apprenticeship is available in this area:

* Medical Assistant registered apprenticeship
* Community Health Worker registered apprenticeship

# Post-Secondary Pathway Opportunities

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

* Medical Assistant
* Medical Administrative Professional
* Health Information Technology

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| --- | --- |
| WI Youth Apprenticeship Logo | Medical Office  Youth Apprenticeship  On-the-Job Learning Performance Standards Guide |

# Youth Apprentice information

|  |
| --- |
| Youth Apprentice Name |
| YA Coordinator |
| YA Consortium |
| School District |

# SIGNATURES

The On-the-Job Learning Performance Standards Guide includes a list of competencies youth apprentices learn through mentoring and training at the worksite.

Instructions for the Worksite Employers/Mentors and School-Based or YA coordinators: This document should be reviewed with the employer/mentor, school-based or YA coordinator on a regular basis with the youth apprentice to record progress and plan future steps to ensure completion of the required competencies. Mentors, school-based/YA coordinator, and the apprentice sign below.

**Employer/Mentor**

**1st Evaluation (Required) 2nd Evaluation (Required)**

|  |  |
| --- | --- |
| Employer/Mentor Signature | Employer/Mentor Signature |
| Employer/Mentor | Employer/Mentor |
| Business/Company | Business/Company |
| Date Signed | Date Signed |

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

|  |  |
| --- | --- |
| Employer/Mentor Signature | Employer/Mentor Signature |
| Employer/Mentor | Employer/Mentor |
| Business/Company | Business/Company |
| Date Signed | Date Signed |

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

**1st Evaluation (Required) 2nd Evaluation (Required)**

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

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

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

**Youth Apprentice**

**1st Evaluation (Required) 2nd Evaluation (Required)**

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

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

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

# employability Skills (TO BE COMPLETED BY yA EMPLOYER/MENTOR)

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

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

|  | **Employability Skills** | **Rating** | | | |
| --- | --- | --- | --- | --- | --- |
| **Competency and Rating Criteria** | | ***Minimum Rating of 2 for EACH***  ***Check Rating*** | | | |
| **Initial** | **Mid Year 1** | **Mid Year 2** | **Final** |
| 1. Develops positive work relationships with others.   *Examples of qualities and habits that the employee might exhibit include . . .*   * Interacts with others with respect and in a non-judgmental manner * Responds to others in an appropriate and non-offensive manner * Helps co-workers and peers accomplish tasks or goals * Applies problem-solving strategies to improve relations with others * When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Communicates effectively with others   *Examples of qualities and habits that the employee might exhibit include . . .*   * Adjusts the communication approach for the target audience, purpose, and situation to maximize impact * Organizes messages/information in a logical and helpful manner * Speaks clearly and writes legibly * Models behaviors to show active listening * Applies what was read to actual practice * Asks appropriate questions for clarity | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Collaborates with others   *Examples of qualities and habits that the employee might exhibit include . . .*   * Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities * Shares responsibility for collaborative work and decision making * Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise * Avoids contributing to an unproductive group conflict * Shares information and carries out responsibilities in a timely manner | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Maintains composure under pressure   *Examples of qualities and habits that the employee might exhibit include . . .*   * Uses critical thinking to determine the best options or outcomes when faced with a challenging situation * Carries out assigned duties while under pressure * Acts in a respectful, professional, and non-offensive manner while under pressure * Applies stress management techniques to cope under pressure | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Demonstrates integrity   *Examples of qualities and habits that the employee might exhibit include . . .*   * Carries out responsibilities in an ethical, legal and confidential manner * Responds to situations in a timely manner * Takes personal responsibility to correct problems * Models behaviors that demonstrate self-discipline, reliability, and dependability | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Performs quality work   *Examples of qualities and habits that the employee might exhibit include . . .*   * Carries out written and verbal directions accurately * Completes work efficiently and effectively * Performs calculations accurately * Conserves resources, supplies, and materials to minimize costs and environmental impact * Uses equipment, technology, and work strategies to improve workflow * Applies problem-solving strategies to improve productivity * Adheres to worksite regulations and practices * Maintains an organized work area | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Provides quality goods or services (internal and external)   *Examples of qualities and habits that the employee might exhibit include . . .*   * Shows support for the organizational goals and principles by own personal actions * Displays a respectful and professional image to customers * Displays an enthusiastic attitude and desire to take care of customer needs * Seeks out ways to increase customer satisfaction * Produces goods to workplace specifications | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Shows initiative and self-direction   *Examples of qualities and habits that the employee might exhibit include . . .*   * Prioritizes and carries out responsibilities without being told * Responds with enthusiasm and flexibility to handle tasks that need immediate attention * Reflects on any unsatisfactory outcome as an opportunity to learn * Improves personal performance by doing something different or differently * Analyzes how own actions impact the overall organization * Supports own action with sound reasoning and principles * Balances personal activities to minimize interference with work responsibilities | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Adapts to change   *Examples of qualities and habits that the employee might exhibit include . . .*   * Shows flexibility and willingness to learn new skills for various job roles * Uses problem-solving and critical-thinking skills to cope with changing circumstances * Modifies own work behavior based on feedback, unsatisfactory outcomes, efficiency, and effectiveness * Displays a "can do" attitude | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Demonstrates safety and security regulations and practices   *Examples of qualities and habits that the employee might exhibit include . . .*   * Follows personal safety requirements * Maintains a safe work environment * Demonstrates professional role in an emergency * Follows security procedures * Maintains confidentiality | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Applies job-related technology, information, and media   *Examples of qualities and habits that the employee might exhibit include . . .*   * Applies technology effectively in the workplace * Assesses and evaluates information on the job * Assesses training manuals, website, and other media related to the job | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Fulfills training or certification requirements for employment   *Examples of this requirement may include . . .*   * Participation in required career-related training and/or educational programs * Passing certification tests to qualify for licensure and/or certification * Participation in company training or orientation | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Sets personal goals for improvement   *Examples of this requirement may include . . .*   * Setting goals that are specific and measurable * Setting work-related goals that align with the organization's mission * Identifying strategies to reach goals * Reflecting on goal progress to regularly evaluate and modify goals | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |

# OCCUPATIONAL Competencies (TO BE COMPLETED BY yA EMPLOYER/MENTOR)

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

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

| **Occupational Competencies** | **Rating** | | | |
| --- | --- | --- | --- | --- |
| **Competency and Rating Criteria** | ***Year 1 Evaluation***  ***Minimum Rating of 2 for EACH***  ***Check Rating*** | | | |
| **Initial** | **Mid Year 1** | **Mid Year 2** | **Final** | |
| 1. **Locate information in the client record**  * access appropriate client record * navigate the client record to locate information * assemble information as requested * maintain confidentiality of client information | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| 1. **Create and/or maintain a client record**  * ensure client privacy and comply with HIPAA requirements * verify the patient's current address, phone number and allergy information * ensure client identification appears on each record or form used * confirm accuracy of information * copy or scan insurance cards or other documents as required | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| 1. **Navigate the medical record and/or client scheduling software**  * open the record * accurately schedule appointments or check in clients * accurately utilize medical terminology in scheduling medical appointments | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| 1. **Manage client appointments**  * greet client * display sensitivity to client information * refer client for priority scheduling or urgent care * identify the time required for the health service * enter appointment and other required information * document scheduling changes in the correct locations * manage appointment reminders * enter appointment results: late, no show, rescheduled, cancelled, etc. | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Answer phones  * answer promptly with an appropriate greeting * triage calls as appropriate * transfer call to appropriate individual when necessary minimizing time on hold * respond discretely to the caller * do not provide confidential information without appropriate authorization * take messages correctly documenting information | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Perform basic payment collection  * verify insurance coverage, deductibles, and co-payments using electronic systems or other means * document disbursements or deposits to the cash drawer in the appropriate record * operate cash register and make accurate change if applicable | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Use common office software applications  * utilize basic features of office software * manage files within an application * perform common editing and formatting functions * perform common printing functions | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Order and receive supplies and/or equipment  * place orders for supplies, equipment, and/or medications * verify the receipt of a shipment * identify supply items and/or medications requiring special handling or storage * store and stock items appropriately * update inventory record * file or route warranty and service agreements as appropriate * file or route the Packing Slip and/or any Material Data Sheets (MDS) received to the appropriate places | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Perform an inventory of supplies and/or equipment  * complete inventory of supplies, equipment, and/or medications * document inventory * communicate changes in availability to worksite professional * assist with removal and disposal of expired, damaged, and/or recalled items as required * straighten and clean shelves | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Demonstrate customer service skills  * focus on effective customer communication * determine responsive methods to identify and meet customer needs * determine effective customer follow-up procedures * meet the needs of the diverse customer | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | |
| Competency Substitute (if you replaced a competency above, note the competency and rating) | **1**  **2**  3 | **1**  **2**  3 | **1**  **2**  3 | **1**  **2**  3 | |
| **Comments**: | | | | |

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