Leadership

American College
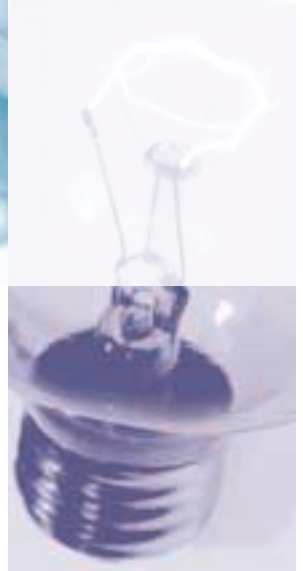of Medical Practice
Executives

ACMPE®

Interaction

Inspiration

The ACMPE® Guide to the Body of Knowledge

for Medical Practice Management

Presented by
The American College of Medical Practice Executives

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Preface

About the Sponsoring Organizations

The American College of Medical Practice Executives (ACMPE), established in 1956, supports and promotes the personal and professional growth of health care leaders to advance the profession of medical practice management. ACMPE is the certification and standard-setting body of the Medical Group Management Association (MGMA), the national membership organization for the medical practice management profession. With more than 4,000 members, ACMPE grants nationally recognized certification and fellowship designations to medical practice executives and leaders. ACMPE developed the industry-standard Body of Knowledge for Medical Practice Management, the foundation for the medical group management industry. The Body of Knowledge serves as the structure for all ACMPE assessments, examinations and leadership development programs.

Today, ACMPE-certified professionals manage some of the top-performing group practices in the nation and are among the best-compensated for their positions. ACMPE, together with MGMA, provides the resources to support professional development and achievement with services that include mentoring, publications, transcript services, scholarship programs, tutorials, education and professional networking.

For more information on ACMPE, go to *www.acmpe.com*.

The Medical Group Management Association (MGMA), founded in 1926, is the nation's principal voice for medical group practice. MGMA's 18,000 members manage and lead more than 9400 organizations, including some 6,900 medical groups, in which more than 188,000 physicians practice. MGMA's core purpose is to improve the effectiveness of medical group practices and the knowledge and skills of the individuals who manage and lead them. Through its annual surveys of practice cost, physician compensation and management compensation, MGMA produces the industry-standard in benchmark data for medical practices. Other services include top-notch education programs, peer networking (face-to-face and virtual), the world's largest library on medical group practice information, books and publications, career services and national advocacy through MGMA's Washington D.C. office.

MGMA also operates the MGMA Center for Research, a 501(c)(3) research organization which conducts quantitative and qualitative research to advance the art and science of medical group management.

For more information on MGMA, go to *www.mgma.com*.

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Navigating this Guide

This guide, developed by the American College of Medical Practice Executives (ACMPE), is a primary resource for those who seek professional assessment and development in medical practice management.

The contents, which expand upon a summary of the Body of Knowledge for Medical Practice Management published by ACMPE in 1999, are based on an extensive study of the role of the medical practice executive and the knowledge and skills required for success in the field.

What does it take to be an effective medical practice executive? What is the core body of knowledge required for proficiency in medical practice management in today's health care environment? This guide answers those questions and more.

Links to browse and navigate

To help you obtain the information you want and to make it easy to navigate, we provide links for moving around elements and sections. Using the navigation links, you can gain an overview of the five general competencies, as well as an in-depth description of tasks, knowledge and skill requirements.

Also included are links to resources from the Medical Group Management Association (MGMA) and ACMPE to help professionals strengthen their knowledge of medical practice management, including publications, assessment tools, educational offerings and other professional development resources.

Review the origins of the Body of Knowledge

To learn how the Body of Knowledge for Medical Practice Management was developed, its importance and continuing evolution, as well as how professional organizations like ACMPE and MGMA use the Body of Knowledge, go to *The Origins and Importance of the Body of Knowledge for Medical Practice Management*.

Learn how to use the Body of Knowledge

To learn the many ways you can use the information in this guide for your personal development, to improve your organization or educate others, go to *Using the Body of Knowledge*.

View the road map of the Body of Knowledge

To see the entire terrain of the Body of Knowledge for Medical Practice Management, connect to the *Overview of the Body of Knowledge* and click on links to access in-depth information.

NAVIGATION TIP

We recommend that you save this document to your hard drive. This will make for more efficient navigation between the document and the world wide web.

If you save this document to your hard drive, be aware that it will be periodically updated at the ACMPE web site.

Take a personal inventory

Take a free inventory of your knowledge and skill with the *ACMPE Technical/ Professional Knowledge Inventory*.

This inventory is a subjective assessment of your strengths and weaknesses in key Body of Knowledge performance areas. Take the inventory in full or in part and find links to additional resources to strengthen your knowledge and skills. This is an easy first step to building competency in specific areas of medical practice management.

Do a complete knowledge assessment

For an objective assessment of strengths and weaknesses in your medical practice management knowledge base, take the 175-question *ACMPE Knowledge Assessment*. Based on the ACMPE Body of Knowledge for Medical Practice Management, this evaluation gives you instant results at your desk-top. This assessment is useful in preparing for the ACMPE objective exam or as a personal guide for your professional development.

Understand the general competencies required

To understand the distinct sets of abilities that form the foundation of success for medical practice executives, go to *General Competencies for Medical Practice Management*.

Learn the professional knowledge and skills

To learn about the important domains of performance contained in the fifth general competency of Professional Knowledge, go to *Competency Five: Technical/Professional Knowledge and Skills*.

Learn the terms

To understand the various expressions used in this Guide, go to the *Glossary*.

Get information on more resources

To access books, educational opportunities and other resources that will support your professional development in all areas, use the handy links to ACMPE and MGMA resources throughout this Guide.

The Origins and Importance of the Body of Knowledge for Medical Practice Management

The identification and articulation of a relevant body of knowledge are essential steps in any profession's development. The validation of a body of knowledge by a community of peers is the prerequisite for the presentation of a profession's requirements for knowledge and skills.

For medical practice professionals, the Body of Knowledge for Medical Practice Management represents just such a milestone. Our validation process has provided an accurate and detailed description of the role and responsibilities of medical practice, the general competencies and specific knowledge and skills for carrying them out. This Body of Knowledge is a current but evolving resource which practitioners can visit and revisit for the perspective they need to understand the foundations of their current work and the future challenges.

Mastering the knowledge

The presumption that there is a body of knowledge that practicing medical practice executives must master has been evident in the literature of the profession for many years. However, the profession has lacked a clearly identified inventory of current competencies scientifically validated by the broad community of medical practice executives. To this end, the ACMPE began a study in 1998 to identify and validate the role requirements of medical practice management professionals.

As part of this process, ACMPE convened a Role Delineation Panel of experts in medical practice management drawn largely from the ACMPE membership. The 12-member panel represented a variety of practice settings, geographical regions, educational levels and years of experience. The panel identified eight major performance domains (i.e., areas of responsibility), a variety of key tasks associated with successful performance in these domains, and the knowledge, skills and abilities required for completing each task.

The identification of these domains and tasks was validated by a psychometric and quantitative review of the survey responses of a statistically valid sample of ACMPE and MGMA members, including physicians. Subsequent to this survey, ACMPE convened panels of subject matter experts drawn from the MGMA assemblies and societies and the Education/Information Center Committees to further develop knowledge and skill statements within each performance domain.

Why is this study important?

The results of this work, *The Guide to the Body of Knowledge for Medical Practice Professionals*, provides the framework for helping current practitioners identify gaps in their professional preparation and for educating and certifying the competency of those working in the field.

The Guide to the Body of Knowledge for Medical Practice Management provides a professional development setting for those advancing or entering the field. For example, educational planners will find it a resource for developing educational curricula and programs with relevant content that meet the needs of the practitioners of today and tomorrow. For the medical practice management profession, it serves as an on-going marker that determines the boundaries and definitions of who we are as professionals in this field.

The Body of Knowledge lives...

Possession of a body of knowledge is one way that professionals establish their claim to expertise that deserves recognition. Changes in a profession's body of knowledge are not only expected but indicate its vibrancy.

Our profession's Body of Knowledge is an expanding universe that responds to the needs of today's health care organizations. The job of medical practice executives is to help organizations reach objectives through the strategic use of information drawn from this Body of Knowledge. The *duty* of medical practice executives is to examine and question the contents of the Body of Knowledge and make new contributions to it.

This collection of work, as a continuously evolving and living representation of the profession, will change and grow over time. Necessary review and modification to the Body of Knowledge requires thought, imagination, an awareness of the public interest and continued research of the role of the medical practice executive.

How does the American College of Medical Practice Executives and the Medical Group Management Association use the Body of Knowledge?

ACMPE and MGMA, as professional membership associations, use the Body of Knowledge for Medical Practice Management as their primary source for:

- *Identifying the professional development needs of medical practice executives*

MGMA uses the Body of Knowledge as a basis for developing and classifying a variety of education, information and networking resources uniquely relevant to the needs and specific job duties of the medical management professional.

- *Providing certification and standard-setting activities to preserve the profession's integrity and promote its growth*

ACMPE uses the Body of Knowledge for developing assessments, examinations and other resources for the professional certification process. Just as a blueprint guides the construction of a building, so a clear statement of the knowledge, skills and abilities required for professional competence determines the content and form of an examination.

This reliance on the Body of Knowledge ensures a demonstrable linkage between the profession and the education, information and certification testing that the Associations provide to the practicing professional.

Resources for the professional

Find out more about **ACMPE Certification**.

Get an objective assessment of your proficiency in all areas of the Body of Knowledge by taking the **ACMPE Knowledge Assessment**.

View the current **MGMA education calendar**.

Find **books and other resources**.

Using the Body of Knowledge

Medical practice management professionals at all career stages can use the information to guide their personal growth and development, as well as to advance their organizations.

In addition, physicians, planners, human resource managers, educators and others with responsibilities for supporting the effective management of medical practices will also find this information useful for developing staffing models and management structures, creating relevant educational offerings and establishing medical practice business goals.

This Guide also provides medical practice executives a selection of resources relevant to their jobs. Here are some specific ways to use the Guide to the Body of Knowledge for Medical Practice Management:

For your professional development assessment and planning use
the Guide to the Body of Knowledge for Medical Practice Management to:

- *Identify the five general competencies of a well-rounded medical practice executive*

- *Learn about the eight major performance domains in which practice managers must function effectively*

- *Identify key tasks that must be performed with competence for successful management of a medical practice*

- *Identify gaps in your personal knowledge and skill base*

- *Structure a professional development plan that targets general competency development and identifies topics for further study*

- *Target limited professional development resources most effectively in the key areas identified by assessment*

- *Know exactly what is required to earn ACMPE certification*

To improve your organization use
the Guide to the Body of Knowledge for Medical Practice Management to:

- *Perform an internal, high-level audit of the practice by determining if and how key tasks are being conducted*

- *Structure staffing models and job descriptions for a variety of management positions within the medical practice*

- *Guide your search and evaluation of management staff and consultants*

- *Structure roles and responsibilities for consultants and advisers*

To educate others use
the Guide to the Body of Knowledge for Medical Practice Management to:

- *Serve as a framework for mentoring others in your practice*

- *Show physicians and other health care professionals the complexity and importance of the medical practice executive's role in the organization*

- *Demonstrate the level of professionalism required for effective performance in today's practice settings*

- *Advocate for the continuous development of the management staff and the need for an organizational commitment to this valued resource*

- *Communicate the value and role of medical practice executives through presentations to hospital staff, students and community groups*

- *Demonstrate the concrete benefits that accrue to medical practice through the medical practice executive's participation in professional development activities through organizations such as MGMA and ACMPE*

Click to learn how ACMPE uses the Body of Knowledge in the certification process and to find out more about *ACMPE Certification*.

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Overview of the Body of Knowledge for Medical Practice Management

The Body of Knowledge for Medical Practice Management comprises:

A listing and description of the **Five General Competencies for Medical Practice Management**, key sets of abilities that are prerequisites for successful job performance as a medical practice executive:

1. Professionalism — *Achieving and preserving professional standards*

2. Leadership — *Supporting the organization's strategic direction*

3. Communication Skills — *Interacting with others and presenting information clearly and concisely*

4. Organizational & Analytical Skills — *Solving problems, making decisions and developing systems*

5. Technical/Professional Knowledge and Skills — *Developing the knowledge base and skill sets necessary to perform activities unique to the job, role or task of a medical practice executive*

The Technical/Professional Knowledge and Skills competency contains an in-depth description of the **eight major performance domains** or areas of responsibility for medical practice executives:

1. Financial Management

2. Human Resource Management

3. Planning and Marketing

4. Information Management

5. Risk Management

6. Governance and Organizational Dynamics

7. Business and Clinical Operations

8. Professional Responsibility

Within each of the Technical/Professional Knowledge and Skills performance domains are detailed listings of the **skills, tasks and core knowledge** that medical practice executives should develop to carry out their role.

ACMPE Technical/Professional Knowledge Inventory

The ACMPE Technical/Professional Knowledge Inventory is a tool to help you assess what you believe to be your current level of knowledge in the eight performance domains that define the scope of responsibility of medical practice executives.

Each section of the inventory focuses on a different performance domain and includes a listing of specific tasks for evaluation.

The eight domains:

Financial Management

Human Resource Management

Planning and Marketing

Information Management

Risk Management

Governance and Organizational Dynamics

Business and Clinical Operations

Professional Responsibility

After completing the inventory, use your ratings of knowledge in each performance domain to target personal objectives for your professional development plan and identify study areas for the ACMPE certification examinations.

Links at the end of each performance domain include a complete listing of the skills and topics required to achieve competency in each performance area, as well as professional development resources from ACMPE and MGMA.

NAVIGATION TIP

To retain your answers to the inventory, save this document to your hard drive or print the inventory pages.

If you save this document to your hard drive, be aware that it will be periodically updated at the *ACMPE web site*.

The following inventory is a checklist based on the Technical/Professional Knowledge competency, one of five competencies defined in the Body of Knowledge for Medical Practice Management. The inventory contains the eight performance domains.

1. Financial Management

For each task in the Financial Management domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Prepare and manage budgets			
Develop accounting and financial control systems			
Prepare financial statements and conduct financial analysis			
Develop and manage material procurement and payment systems			
Develop coding and reimbursement policies and procedures			
Facilitate investment planning, management and compliance			
Establish business relationships with financial advisors			
Establish fee schedules for physician services			
Negotiate third-party contracts			
Develop reconciliation systems for third-party payor reimbursement			
Facilitate retirement planning, management and compliance			
Maintain compliance with tax laws and filing procedures			

Click to find a complete list of *financial management* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in all areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

2. Human Resource Management

For each task in the Human Resource Management domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Develop compensation and benefits programs consistent with the values of the organization			
Establish job classification systems			
Develop employee placement programs and facilitate workforce planning			
Establish employee appraisal and evaluation systems			
Develop and implement employee training programs			
Establish employee relations and conflict resolution programs			
Maintain compliance with employment laws			

Click to find a complete list of *Human Resource Management* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in all areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

3. Planning and Marketing

For each task in the Planning and Marketing domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Develop strategic plans			
Create business plans			
Create marketing plans			
Monitor and evaluate effectiveness of strategic, business and marketing plans			
Pursue and establish partnerships and strategic alliances			
Develop and implement community outreach, public relations and customer relations programs			

Click to find a complete list of *planning and marketing* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in all areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

4. Information Management

For each task in the Information Management domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Conduct information system needs analysis			
Facilitate information system procurement and installation			
Develop and implement information system training and support programs			
Oversee database management and maintenance			
Develop information network security systems			
Provide access to electronic education and information resources and systems			

Click to find a complete list of *information management* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in all areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

5. Risk Management

For each task in the Risk Management domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Maintain legal compliance with corporate structure			
Maintain corporate history and develop record-keeping procedures			
Develop conflict resolution and grievance procedures			
Assess and procure liability insurance			
Establish personnel and property security plans and policies			
Develop and implement quality assurance and patient satisfaction programs			
Establish patient, staff and organizational confidentiality policies			
Conduct audits of at-risk financial activities			
Develop professional resource networks for risk-related activities			
Negotiate and comply with contractual arrangements			
Maintain compliance with government contractual mandates			

Click to find a complete list of *risk management* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in these and all other areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

6. Governance and Organizational Dynamics

For each task in the Governance and Organizational Dynamics domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Lead and manage the organizational change process for practice improvement			
Construct and maintain governance systems			
Evaluate and improve governing bylaws, policies and processes			
Conduct stakeholder needs assessment and facilitate relationship development			
Facilitate staff development and teaming			
Facilitate physician understanding and acceptance of good business management			
Develop and implement quality assurance programs			

Click to find a complete list of *Governance and Organizational Dynamics* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in these and all other areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

7. Business and Clinical Operations

For each task in the Business and Clinical Operations domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Facilitate business operations planning			
Conduct staffing analysis and scheduling			
Develop ancillary clinical support services			
Establish purchasing, procurement and inventory control systems			
Develop and implement facilities planning and maintenance programs			
Establish patient flow processes			
Develop and implement patient communication systems			
Develop clinical pathway structure and function			
Create monitoring systems for licensure, credentialing and recertification			
Develop and implement process improvement programs for clinic operations			

Click to find a complete list of *business and clinical operations* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in these and all other areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

8. Professional Responsibility

For each task in the Professional Responsibility domain, indicate what you believe to be your current level of knowledge by checking the appropriate box.

	Low	Moderate	High
Advance professional knowledge and leadership skills			
Balance professional and personal pursuits			
Promote ethical standards for individual and organizational behavior and decision-making			
Conduct self-assessments			
Engage in professional networking			
Advance the profession by contributing to the body of knowledge			
Develop effective interpersonal skills			

Click to find a complete list of *professional responsibility* skills and topic areas for study and development.

Books and other resources

Education programs

ACMPE certification

Get an objective assessment of your knowledge in these and all other areas of the Body of Knowledge by taking the *ACMPE Knowledge Assessment*.

Back to the start of the *ACMPE Technical/Professional Knowledge Inventory*.

Five General Competencies for Medical Practice Management

Success in any profession requires knowledge and skills in a variety of areas. The Body of Knowledge for Medical Practice Management identifies five areas of ability or general competencies expected of practitioners in the field.

1. Professionalism

Medical practice executives must demonstrate a commitment to achieving professional standards that enhance personal and organizational integrity and contribute to the profession. They must be able to:

- *Actively engage in a program of self-assessment and continuous learning.*

- *Manage the overload of information and stress generated from diverse situations that occur in the practice and their personal lives.*

- *Advocate for ethical decision-making in the practice.*

- *Carry out service activities to support the development of their colleagues, the profession and the community.*

2. Leadership

Medical practice executives must demonstrate leadership by collaborating with and supporting the practice's physician leadership to provide strategic direction to the organization and the operational systems to carry it out. They must be able to:

- *Foster teamwork between clinical and administrative staffs.*

- *Support the creation of an effective system of physician governance.*

- *Introduce and promote changes to improve practice performance, accountability and patient care.*

- *Develop external relationships to benefit patients, the practice and the community.*

3. Communication Skills

Medical practice executives must demonstrate the communication skills necessary to elicit multiple points of view from internal and external sources, facilitate constructive interaction and present information clearly and concisely. They must be able to:

- *Seek out and incorporate the views of physicians, management professionals, staff, patients and other external stakeholders into decisions that affect the quality of care, the work-place environment and the business stability of the practice.*

- *Logically organize the presentation of information.*

- *Identify and utilize appropriate human and technical resources to develop communication vehicles.*

- *Present information orally and in writing.*

- *Facilitate discussion, conflict resolution and problem solving.*

4. Organizational and Analytical Skills

Medical practice executives must demonstrate a systematic approach to problem solving, decision making and the development and administration of systems to address day-to-day issues and the long-term improvement needs of the practice. They must be able to:

- *Collect and analyze data from internal and external sources relevant to each situation.*

- *Discriminate between important and unimportant aspects of a variety of situations that affect the business and clinical performance of the practice as a basis for sound decision making.*

- *Recommend knowledge-based solutions and courses of action that will enhance the practice's ability to satisfy the needs of physicians, staff, patients and other external stakeholders.*

- *Organize and carry out planning and implementation processes that support achievement of organizational goals.*

- *Organize and manage the human and physical resources of the practice to achieve input, buy-in and optimal performance.*

- *Continually monitor and evaluate the practice's ability to achieve its intended outcomes as a basis for modifying and improving systems and processes.*

5. Technical/Professional Knowledge and Skills

Medical practice executives must demonstrate the knowledge essential for competent job performance as defined in the Body of Knowledge for Medical Practice Management. They must be able to:

- *Recognize the important situational features that make the management of medical practices unique from other health care and business settings.*

- *Understand and apply the management information, concepts and principles necessary to address a broad range of medical practice tasks and situations in the eight performance domains of:*

  Financial Management

  Human Resource Management

  Governance and Organizational Dynamics

  Planning and Marketing

  Information Management

  Risk Management

  Business and Clinical Operations

  Professional Responsibility

back to the start of ***Five General Competencies for Medical Practice Management***.

Those seeking to complete the requirements for ACMPE certification must demonstrate competency in each of these five areas. Click to find more information about ***ACMPE certification***.

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Competency Five—
Technical/Professional Knowledge

A necessary cornerstone of any profession is the specialized knowledge base and skill-set that practitioners must develop for success in the field. The Body of Knowledge for Medical Practice Management indicates that, among other competencies, medical practice executives must be able to carry out a variety of management and leadership tasks within eight major performance domains:

Financial Management

Human Resource Management

Governance and Organizational Dynamics

Planning and Marketing

Information Management

Risk Management

Business and Clinical Operations

Professional Responsibility

The following sections provide in-depth descriptions of task, knowledge and skill requirements within each of these domains.

Links are provided to the glossary (for definitions of abbreviations and terms used) and information on a variety of ACMPE and MGMA professional development resources.

Technical/Professional Knowledge Performance Domain One
Financial Management: Skills, Tasks, Knowledge

Financial Management Skills

Key financial management skills for the medical practice executive are:

- *Translating medical practice objectives into financial assumptions for short-term and/or long-term planning.*

- *Projecting practice revenue/related expenses and developing budget models to guide practice activities.*

- *Prioritizing projects in line with the practice's financial goals, negotiating resource allocation and directing work teams to achieve revenue/expense objectives.*

- *Compiling, interpreting and communicating financial information to various audiences, including physicians/shareholders and staff in verbal and written forms for education and decision making.*

- *Identifying and using financial software applications to facilitate the medical practice's billing/collections, general ledger, cost accounting, spreadsheets and investments.*

- *Analyzing and controlling budget variances to ensure tight fiscal management.*

- *Evaluating vendor/consultant credentials and manage the practice's professional resources.*

- *Developing requests for proposals (RFPs), analyzing and negotiating/ renegotiating contract terms favorable to the practice.*

- *Designing and monitoring systems of checks and balances and internal controls to safeguard practice assets.*

- *Calculating business ratios and benchmarks to keep the practice competitive.*

- *Analyzing the relationship of fees to coding/diagnosis for appropriate reimbursement to practice.*

- *Developing and monitoring policies and procedures to direct financial activities.*

Financial Management Tasks

Medical practice executives must use the skills described above to ensure that the following tasks are carried out in a medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1	*Prepare and manage budgets to achieve organizational objectives*
TASK 2	*Develop accounting and financial control systems*
TASK 3	*Prepare financial statements and conduct financial analysis*
TASK 4	*Develop and manage material procurement and payment systems*
TASK 5	*Develop coding and reimbursement policies and procedures*
TASK 6	*Facilitate investment planning, management and compliance*
TASK 7	*Establish business relationships with financial advisers*
TASK 8	*Establish fee schedules for physician services*
TASK 9	*Negotiate third-party contracts*
TASK 10	*Develop reconciliation systems for third-party payor reimbursement*
TASK 11	*Facilitate retirement planning, management and compliance*
TASK 12	*Maintain compliance with tax laws and filing procedures*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

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Financial Management Knowledge by Task

Financial Management Task 1:
Prepare and manage budgets to achieve organizational objectives

Core financial management knowledge for Task 1

Strategic direction of the organization
Mission and vision
Short-term and long-term goals and strategies
Impact of budget

Market trends
General social, technological, economic, political trends
Specific industry trends
Potential changes in revenue, rates, costs, staffing models
Impact on resource development and allocation

Budget items/types
Revenue budget
Expense budget
Operating budget
Line-item budget by departments, locations, providers, business lines
Program/department budget
Zero-based budget
Cash-flow budget
Capital budget

Return to **Financial Management Task Table**.

Find **books and other products on Financial Management**.

Find **educational resources** on Financial Management

Take an objective **knowledge assessment** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Financial Management Task 2:
Develop financial accounting and controls systems

Core financial management knowledge for Task 2

Financial and accounting principles
Generally accepted accounting and auditing practices (GAAP, GAAS)
Role of certified public accountant
Cash vs. accrual accounting
Fixed vs. variable costs
Direct vs. indirect costs
Capitalization
Depreciation
Conservatism
Consistency

Financial forecasting models
Pro forma
Cash flow
Statistical
Asset liabilities/capital budgeting
Benchmarking

Accounting system development and analysis
Double-entry bookkeeping
Documentation and control
Accounting period
Process flow
Adjustments
General journal/ledger
Subsidiary ledgers
Revenue determination
Expense determination
External reports
Physician income distribution and productivity
Short-term financial management
Long-term financial management

Organizational accounting needs
Organizational chart
Departments
Functionality
Policies and procedures
Process management
Management responsibilities (board, staff)

Financial Management Task 2: continued

Chart of accounts methodologies
Five basic accounts
Information sources
Complexity level/numbering system
Account categories

Financial decision-making tools
Present value
Time value of money

Financial information systems
General accounting (A/R, A/P, payroll, general ledger, billing/collection, patient accounting, cost accounting, claims processing)
Contract management
Practice management
Patient management
Productivity tracking
Decision support system
Security
Confidentiality

Managerial accounting principles
Decision-making information for planning and controlling
Cost accounting
Budgeting
Systems analysis
Division of labor
Level of authorization
Cash-flow management
Financial statement preparation
Financial analysis

Internal controls
Bank reconciliations
Check signing
Reimbursed expenses
Petty cash control
Deposits
Approvals/authorizations and verifications
Reviews of operating performance
Security of assets
Segregation of duties

Accounting audit control functions
Independent auditor examination
Audit report
Types of audits
Types of auditors
Unaudited financial statements
Audited financial statements

Financial Management Task 2: continued

Compliance
Compliance program, education, monitoring, accountability
Preventive measures
Conflict of interest
U.S. Department of Justice/Office of Inspector General audits
Stark law, referrals
CMS, Medicare/Medicaid billing fraud and abuse
Antikickback
HIPAA

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Financial Management Task 3:
Prepare financial statements and conduct financial analysis

Core financial management knowledge for Task 3

Financial and cost accounting techniques
Modeling
Forecasting
Benchmarking
Cost/benefit analysis
Statistical analysis

Sources of revenue
Medical reimbursement
Clinical drug trials
Alternative medicine
e-commerce
Ancillary services
Ambulatory surgery center

Financial statement types/steps
Basic financial statements
Preparation of trial balance and financial statements
Statement of functional expenses
Statement of cash flows
Notes to financial statements
Analysis of financial statements
Benefits of financial statements

Key indicators
Practice performance - gross charges, net revenue, operating costs, current ratio, days in A/R, net/gross collection percentages, salaries, supplies, bad debts, number of staff
Benchmarking to cost surveys, physician compensation surveys
Prepaid services

Variance analysis
Budget comparison - actual to estimates
Plan to correct/shift resources
Budget modifications

Return to **Financial Management Task Table**.

Find **books and other products on Financial Management**.

Find **educational resources** on Financial Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 4:
Develop and manage material procurement and payment systems

Core financial management knowledge for Task 4

Materials management principles and models
RFP process
Par values vs. just-in-time inventory
Purchasing control
Group/Internet purchasing
Budgeted purchases
Fixed assets
Pricing discounts
Maintenance/leasing contracts
Equipment/service requests

Accounts payable and purchasing systems
Accounts payable management
Aging
Discounts
Vendor relations

Inventory control and management
Reporting on normal flow, variations
Security
Computerization
Current, historic data
Inventory as assets - equipment, supplies

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Financial Management Task 5:
Develop coding and reimbursement policies and procedures to maximize cash flow

Core financial management knowledge for Task 5

Accounts receivable measurement/management systems
Aging
Benchmarking
Net vs. gross revenue
Days outstanding collections

Coding systems, guidelines, resources
CPT and ICD-9
E&M levels of service
CCI and bundling guidelines
Auditing systems
RBRVS
Modifiers
Coding resources (specialty specific)
*Contract reimbursement rates
Risk contracts (capitation and case rates, withholds)
Fee-for-service
Auditing payments

Regulatory agency and contract guidelines and mandates
CMS
Insurance
State
HEDIS
NCQA
JCAHO

Charge capturing, billing and collection systems
Patient encounter records
Billing procedures
Month-end closing
Electronic claims processing
Manual process/computer system
Collection agency policy
Collection letters
Telephone collection
Collection follow-up
Disputes
Bankruptcy claims
Settlements
Time payments
Write-offs

Financial Management Task 5: continued

Front-office activities
Patient flow
Scheduling
Registration
Benefit verification
Copay collection

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 6:
Facilitate investment planning, management and compliance

Core financial management knowledge for Task 6

Financial markets and investment alternatives
Investment options
Cash tools
Cash inflows and outflows
For-profit vs. nonprofit considerations
Investment philosophies
Investments and long-term receivables
Fixed income
Equity
Sources of capital
Managing investments

Organizational goals
Coordinating accounting goals with organizational goals
Risk, return and liquidity
Need for capital infusion

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 7:
Establish business relationships with financial advisers.

Core financial management knowledge for Task 7

Business principles
Banking basics
Accounting/auditing basics
Investment basics

Adviser relationships
Roles, relationship management
Types of advisers (e.g., banker, accountant, retirement adviser, investment adviser.)
Method for choosing
Method for reporting, monitoring

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 8:
Establish fee schedules for physician services

Core financial management knowledge for Task 8

Fee schedule methodologies
Setting charges
RBRVS
McGraw-Hill reference
Case rates
Capitation
Contract reimbursement
Periodic review of fee schedule

Utilization of services under risk agreements
Risk agreement negotiation
Service monitoring

Operational data sources
Frequency counts
Weighted average methodology

Antitrust, fraud and abuse
Compliance communication/education
Prevention programs
Voluntary audits
Reporting methods
Responsibility assignments, roles
Compliance agency interfaces
Outside consultants

Payor mix
Mix
Volume
Reimbursement rates
Market analysis

Noncovered services
Uninsured policy
Write-offs
Charity care

Return to **Financial Management Task Table**.

Find **books and other products on Financial Management**.

Find **educational resources** on Financial Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 9:
Negotiate third-party contracts

Core financial management knowledge for Task 9

Paper contracts
Fee-for-service
Risk (pharmacy, global, professional, primary care, carve-outs, mental health, etc.)
Fee-for-service with bonus
Contract capitation
Case rates
Prospective payment

Managing risk
Actuarial underwriting
Stop-loss insurance
Scope of services
Contract and health care law

Health care quality standards
Quality assurance/performance improvement
Patient satisfaction
NCQA requirements
Payor satisfaction
JCAHO, CMS requirements

Medical management
Utilization management
Disease management

Return to **Financial Management Task Table**.

Find **books and other products on Financial Management**.

Find **educational resources** on Financial Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 10:
Develop reconciliation systems for third-party payor reimbursement

Core financial management knowledge for Task 10

A/R management
RBRVS
Identification of reasons for nonpayment
Development of rejection codes/tracking their use
Tracking and collection of withholds
Denial appeals
Collections of late payment, penalties and interest
PITA factor
Reimbursement methods
Auditing techniques

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Financial Management Task 11:
Facilitate retirement planning, management and compliance

Core financial management knowledge for Task 11

Fiduciary responsibility
Role of trustee
Provision of adequate plan information to beneficiaries

Types of plans
Defined benefits vs. defined contribution
401(k), 403(b), etc.
Prototype vs. nonprototype
Self-directed vs. employer-directed vs. limited option
Super top-heavy vs. top-heavy vs. normal plan
Age weighted and new comparability options
Nondiscrimination clauses
Money purchase, profit sharing and matching contributions

Retirement plan laws, regulations
ERISA
U.S. Department of Labor
Forms and compliance
Tax returns

Administrative services, record keeping and investment management
Evaluation of services, outsource vs. in-house
Cost analysis of total fee structure
Reporting costs
Coordination-external advisers and internal staff

Financial planning for individuals
Physician education
Outside advisers, seminars
Open enrollment meetings
Continuous communication
Open access to information

Plan monitoring
Benchmarking returns to market indices
Investment risk evaluation
Investment adviser evaluation

Return to *Financial Management Task Table*.

Find *books and other products on Financial Management*.

Find *educational resources* on Financial Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Financial Management Task 12:
Maintain compliance with tax laws and filing procedures

Core financial management knowledge for Task 12

Federal and state taxation authorities
Internal Revenue Service
U.S. Department of Labor
State Department of Revenue
Employment Security Commission
Wage and hour regulators
Workers' compensation

Compliance
Administrative checklist
Responsibility assignments by department
Payroll Department
Time/attendance records

External resource coordination
CPA firm
Payroll tax service

Return to **Financial Management Task Table**.

Find **books and other products on Financial Management**.

Find **educational resources** on Financial Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on **ACMPE certification**.

Technical/Professional Knowledge Performance Domain Two
Human Resource Management: Skills, Tasks, Knowledge

Human Resource Management Skills

Key human resource (HR) management skills for the medical practice executive are:

- *Interpreting and integrating federal, state and local laws and industry HR regulations into organizational policies and procedures.*

- *Developing HR measurement/monitoring systems.*

- *Explaining pros and cons of different models of compensation and getting physician buy-in.*

- *Giving/receiving feedback to improve individual and organizational performance.*

- *Analyzing cost/benefit tradeoffs of HR practices and the financial impacts on the practice.*

- *Negotiating employee relations matters fairly to prevent labor disagreements and to ensure the safety of practice personnel.*

- *Tolerating and understanding the stress, criticism and conflict related to HR matters, including disciplinary issues.*

- *Identifying core competencies and job responsibilities specific to medical services and creating clear job descriptions.*

- *Designing recruitment/selection processes to ensure new personnel match practice position needs and staffing/strategic plans.*

- *Understanding the basis for physician behavior and dealing with it effectively.*

- *Assessing and responding to staff needs for training and coaching.*

- *Monitoring and updating HR practice's pay policies with today's dynamic and diverse labor/industry trends and medical practice goals.*

Human Resource Management Tasks

Medical practice executives must use the above skills to ensure that the following tasks are carried out in a medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:   *Design compensation and benefits programs consistent with the values of the organization*

TASK 2:   *Establish job classification systems*

TASK 3:   *Develop employee placement programs and facilitate work force planning*

TASK 4:   *Establish employee appraisal and evaluation systems*

TASK 5:   *Develop and implement employee training programs*

TASK 6:   *Establish employee relations and conflict resolution programs*

TASK 7:   *Maintain compliance with employment laws*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

Human Resource Management Knowledge by Task

Human Resource Management Task 1:
Design compensation and benefits programs consistent with
the values of the organization

Core Human Resource Management Knowledge for Task 1

Organizational considerations
History, values, structure
Philosophy of pay/benefits
Disseminated authority/decision making
Formal vs. informal practices
Organizationally sanctioned vs. unsanctioned compensation
Determination of pay/benefit mix in total compensation

Compensation models
Performance-based
Skill/knowledge/competency-based
Productivity-based
Job analysis-based
Incentive-based

Variable compensation
Incentive pay options
Profit sharing
Cost reduction/gainsharing
Equity ownership
Pay-for-knowledge/skill
Pay-for-performance
Reward for suggestions
Special awards
Bonuses
Team rewards
Supervisory discretionary awards

Market analysis
Marketplace rates
Government data
External competitiveness
Labor markets
Economic conditions

Compensation benchmarks
Published salary surveys (e.g., industry, government, local)
Informal salary surveys (e.g., peer, employee, exit interviews)
Data from recruitment process/new hires

Income distribution models
Income allocation policy
Physician compensation
Shareholder vs. nonshareholder
Salary/incentive ratio
Stock options/ownership

Human Resource Management Task 1: continued

Compensation methods
Pay tables
Salary grades/steps
Broadbanding
Salary increase guides
Performance measures
Equitable pay guidelines
Longevity-seniority considerations
Incentive program criteria
Pay adjustments, timing/type

Compensation communication
Confidentiality issues
Open/closed pay information policy
Shared information
Private information
Annual employee pay/benefit report
Payroll recordkeeping/procedures

Job evaluation
Relative worth of job
Relative importance within organization
Knowledge, skills, abilities needed
Amount/type of education, experience needed
License/certification needed
Difficulty of job
Accountability
Amount of supervision provided/needed
Factor comparison
Point method

Benefit program financing
Benefit package design
Employer-vs. employee-paid
IRS implications
Cost-effectiveness
External contracts vs. self-insured
Qualified vs. nonqualified plans
Self-funding
Long-term benefit cost
Percentage of payroll
Legally required benefits

Eligibility
Physician
Executive
Employee full-time
Employee part-time

Human Resource Management Task 1: continued

Benefit options
Flexible benefits
Health insurance
Life insurance
Dental insurance
Long-term/short-term disability insurance
Accidental death insurance
Paid time off (e.g., sick leave, vacation, holiday, jury duty)
Financial planning/counseling
Housing finance assistance
Child care/elder care
Charitable matching contributions
Long-term care plan
IRAs
Pension plan
Severance pay
Travel insurance
In-house medical services
Vision insurance
Hearing insurance
Postretirement medical benefits

Legal aspects
ERISA
HIPAA
COBRA
IRS payroll obligations
IRS Code Section 457/deferred compensation
Social Security
Workers' compensation
Unemployment insurance

Market economics
Supply/demand influences
Local labor market
Sign-on bonuses
Effects on current staff
Compression issues
Recruiting bonuses

Return to *Human Resource Management Task Table*.

Find *books and other products on Human Resource Management*.

Find *educational resources* on Human Resource Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Human Resource Management Task 2:
Establish job classification systems

Core Human Resource Management Knowledge for Task 2

Job assessment/analysis

Methods (e.g., interview, observation, questionnaire, diary/time log)
Job analysis of job activities
Number of job classes
Job tasks
Difficulty/complexity of duties
Supervision/administration duties
Accountabilities
Working conditions
Performance standards
Reporting relationships
Position analysis
Knowledge/skills/abilities
Physical job requirement/ergonomic standards
ADA issues
EEO issues
Labor relations issues
Interactions with other positions
Medical services responsibilities
Reporting relationships
Employee-written job description

Job description

Position title
General statement of duties
Supervision received
Supervision exercised
Essential functions
Educational requirements
Experience requirements
Other requirements
Skills
Abilities
Competencies
Working conditions
Equipment operated

Health care/business occupations

Medical job categories
Allied health jobs (e.g., radiology, lab)
Nonmedical job categories (e.g., finance, MIS, maintenance)
Position type/employee status

Human Resource Management Task 2: continued

Human resources practices
Relationship to staffing plan
Relationship to compensation
Relationship to appraisal
Relationship to other HR practices (e.g., training)
Protection against pay inequities

Return to *Human Resource Management Task Table*.

Find *books and other products on Human Resource Management*.

Find *educational resources* on Human Resource Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

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Human Resource Management Task 3:
Develop employee placement programs and facilitate work-force planning

Core Human Resource Management Knowledge for Task 3

Organizational goals
Types of staff needed
Numbers needed
Timing required

Organizational structure/culture
Strategic/business plan implications
Job evolution/emerging jobs
Changing expectations
Matching people with organization
Image to applicants
Clinical processes/desired outcomes

Workforce planning
Assessment of existing/future staffing needs
Physician-to-staff ratio
Midlevel provider considerations
Labor shortages
FTE ratios
Staffing/scheduling factors
Shift/extended hours
Budget considerations
Location/space factors
Part-time employees
Outsourcing

Recruitment sources/techniques
Promotion from within
Community placement services
Advertising strategy
Media for placing job ads
Academic institution career centers
Temporary agencies
Internet job posting services
Search firms
Internal referrals
Local/national professional organizations

Human Resource Management Task 3: continued

Selection
Employment application form
EEO factors (e.g., advertising, recruiting, record-keeping)
ADA considerations
Interviewing (screening, structured, behavior-based)
Panel interviews
Open-ended questions
Testing (written, performance)
Consent for reference checks
Criminal investigation
Background checks
Reference checks
Offer of employment
Health information/physical exams
Negligent hiring issues
Laws/regulations

Return to *Human Resource Management Task Table*.

Find *books and other products on Human Resource Management*.

Find *educational resources* on Human Resource Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Human Resource Management Task 4:
Establish employee appraisal and evaluation systems

Core Human Resource Management Knowledge for Task 4

Employee performance review methods
Performance evaluation policy
Competency-based
Productivity/merit pay-based
Scored vs. nonscored
Peer review/360-degree observation
Physician review
Patient review
Essay rating
Critical incident rating
BARS
Performance standards
Criterion-based
Goal setting
Self-assessment
Management/supervisory responsibilities
Link to job description
Contemporary challenges
Frequency/modification
Legal pitfalls

General/specific competencies
Competency classification systems
Staff-specific positions
Continuing education
Patient age-specific (e.g., adult, pediatric)

Constructive feedback
Performance interview
Balanced review
Perceived inequality/undervalued
Coaching/listening
Mentoring
Conflict resolution
Mediation of differences
Recognition/rewarding of desired outcomes
Self-responsibility

Performance development plan
Poor performers
Star/exceptional performers
Long-term employee
New employee
Physician
Ancillary staff
Nonmedical staff
Problem-solving emphasis

Human Resource Management Task 4: continued

Promotion
Job posting
Job bidding
Skills inventory
Personnel records
Staff coordination
Legal considerations
Promotional orientation/training
Link with compensation

Pay for performance/merit pay
Discretionary rewards
Nonmonetary recognition/cashless compensation
Timing of salary review vs. performance review

Return to **Human Resource Management Task Table**.

Find **books and other products on Human Resource Management**.

Find **educational resources** on Human Resource Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

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Human Resource Management Task 5:
Develop and implement employee training programs

Core Human Resource Management Knowledge for Task 5

Adult learning styles
Learning by doing
Didactic teaching
Coaching
Formal/informal preferences
Self-directed
Group interaction

Organizational operations/practices
Philosophy of training/development
Training value to organization
Present cost vs. future investment
Determination of training content/courses
Logistical planning
Replacement schedules
Overtime considerations
Outsourcing vs. in-house training
Benefits vs. pitfalls
Training the trainer
Application/eligibility
Covered expenses/reimbursement
Tuition coverage
Release time
Paid attendance
Meeting time
Continuing education policy

Types of training
Orientation
Technical
Skill
Career development
Supervisory/management
Academic/degree programs
Certification
Cross-training

Human Resource Management Task 5: continued

Training models/media
Job-specific requirements
Computer-based
Video
Interactive
Role playing
Lecture/speaker
Group discussion
Books
Education technology online/software

Desired outcomes
Awareness
Knowledge
Behavior change
Results

Return to *Human Resource Management Task Table*.

Find *books and other products on Human Resource Management*.

Find *educational resources* on Human Resource Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Human Resource Management Task 6:
Establish employee relations and conflict resolution programs

Core Human Resource Management Knowledge for Task 6

Laws and regulations
Federal
State
Local
Employee participation/legal employee committees
Employee and labor relations
Employee organization/representation policy
Union solicitation policy
Arbitration policy
Union avoidance procedures/union-free workforce
Union grievance procedures
Competitive wages
Communication plan
Current personnel policies

Employee grievance procedures
Definition of grievance
Legal requirements
Procedural steps
Communication of procedures
Time limitations
Third-party resolution
Chain of command
Due process
Union considerations
Conflict resolution/mediation models
Trouble-shooting
Positive employee relations
Interest-based
Win-win
Mediation
Arbitration

Human Resource Management Task 6: continued

Progressive discipline
Philosophy of discipline policy
Legal requirements
Supervisory guidelines
Documentation of incidents/observations
Dealing with anger
Policy on employee behavior
Policy on workplace harassment
Policy on workplace violence
Diplomacy
Reprimand
Verbal and written warnings
Decision-making leave
Suspension with/without pay
Discharge considerations
Termination
Documentation

ADA factors
Protected individuals
Essential functions criteria
Reasonable accommodations
Changes in law

Employee assistance program
Conditions of usage
Conditions of employment
Intervention with troubled employees
Prevention/identification of potential workplace violence
Stress management
Tolerance for no-solution situations
Age discrimination
Handling criticism and direct challenges
Objective stance
Fair application of policies
Substance abuse/impaired physicians
Counseling for emotional issues
Family/marital counseling
Financial counseling
Legal counseling
Career counseling

Return to **Human Resource Management Task Table**.

Find **books and other products on Human Resource Management**.

Find **educational resources** on Human Resource Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Human Resource Management Task 7:
Maintain compliance with employment laws

Core Human Resource Management Knowledge for Task 7

Human resources policies/practices

HR policies
Employee handbook
Organizational philosophy/values/culture
Compliance laws/regulations
Time off
Compensation/payroll
Benefits
Discipline
Performance
Employment
Safety and health
Compliance with fraud and abuse laws
Nondiscrimination

Federal/state/local laws and regulations

FLSA - wage and hour
Employment at will
ADA
FMLA
OSHA
Civil Rights Act/Title VII
EEO
Workers' compensation
Sexual orientation (e.g.., state/local laws)
Unemployment compensation
COBRA
Licensure/certification
Record-keeping (e.g., employment files, employee health files)
ERISA
Immigration Reform Control Act
HIPAA
NLRA
Equal Pay Act
Age Discrimination in Employment Act
Vocational Rehabilitation Act
Vietnam Era Veterans Readjustment Act
Pregnancy Discrimination Act
Affirmative action (state-local-specific)

Supervisory training on HR matters

Legal requirements
Consequences for noncompliance
Appropriate/inappropriate actions
Supervisory responsibilities
Employee rights and responsibilities

Human Resource Management Task 7: continued

Supervision review/monitoring functions
Observation
Measurement
Documentation
Investigation
Discipline
Termination

Return to *Human Resource Management Task Table*.

Find *books and other products on Human Resource Management*.

Find *educational resources* on Human Resource Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on *ACMPE certification*.

Technical/Professional Knowledge Performance Domain Three
Planning and Marketing: Skills, Tasks, Knowledge

Planning and Marketing Skills

Key planning and marketing skills for medical practice executives are:

- *Analyzing/interpreting market research data to help guide strategic planning for the practice.*

- *Communicating business-planning factors to physicians and staff to influence movement in synchronization with emerging trends.*

- *Generating ideas to target markets and meet the needs of diverse demographic segments.*

- *Organizing public, customer and community relations programs to communicate the key messages and image of the practice.*

- *Evaluating promotion methods to maximize best fit for each market segment.*

- *Assessing need for additional ancillary services that fit with the practice's mission/vision.*

- *Negotiating external affiliations for the practice.*

- *Serving as a role model for effectively dealing with stress and ambiguity to help physicians and staff cope with change.*

- *Negotiating legal/financial contracts with marketing vendors to ensure best cost-benefit ratio for practice resources.*

- *Facilitating ongoing monitoring of business and marketing plans and making appropriate adjustments in line with medical industry dynamics.*

- *Building consensus on the most appropriate marketing mix to complement the strategic plan.*

- *Designing new products/services to foster practice growth and better serve customers.*

Planning and Marketing Tasks

Medical practice executives must ensure that the following planning and marketing tasks are carried out in the medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:   *Develop strategic plans.*

TASK 2:   *Create business plans.*

TASK 3:   *Create marketing plans.*

TASK 4:   *Monitor and evaluate effectiveness of strategic, business and marketing plan activities.*

TASK 5:   *Pursue and establish partnerships and strategic alliances.*

TASK 6:   *Develop and implement community outreach, public relations and customer relations programs.*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

Planning and Marketing Knowledge by Task

Planning and Marketing Task 1:
Develop strategic plans

Core Planning and Marketing Knowledge for Task 1

Strategic planning principles
Leadership roles of board, administrator
Need for professional outside facilitator
Conflict management/consensus building
Mission, vision, values statements
Planning process, meeting agendas
Retreat logistics, goals
Follow-up

Data collection/analysis
Social, technological, economic, political trends
Strengths, weaknesses, opportunities, threats
Emerging industry trends
Focus groups
Satisfaction surveys
Interviews
Situation assessment
Environmental assessment
Practice assessment
Community needs assessment

Facilitation, decision-making methods
Meeting management
Facilitating vs. running
Delphi technique
Nominal group process
Problem-solving techniques
Brainstorming methods
Creative thinking, critical thinking
Case studies

Planning and Marketing Task 1: continued

Organization structure, culture
History, age of practice
Single specialty, multispecialty
Size of practice
Physician agendas and personalities
Corporate structure
Hierarchy vs. participation
Development of shared sense of purpose
Coordination/integration of work groups

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Planning and Marketing Task 2:
Create business plans

Core Planning and Marketing Knowledge for Task 2

Business plan principles
Types of business plans
Start-up vs. ongoing financing
Operational vs. bank financing
Development of pro formas
Annual operational planning
Annual goals/objectives
Action plans

Marketing impacts on business plan
Trend analysis/change triggers
Product/service development
Budget implications
Staff considerations

Budgeting concepts/financial goal-setting
Return on investment (ROI)
Discounted cash flow methodology
Accrual vs. cash basis financial statements
Financial risk tolerance

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Planning and Marketing Task 3:
Create marketing plans

Core Planning and Marketing Knowledge for Task 3

Market data sources
Census data
Industry trends
Local economics
Web sites
Payors
Business coalitions
Chambers of commerce
State trade organizations
Competitive data

Survey techniques
Focus groups
Patient feedback
Complaint/occurrence data
Evaluation cards
Outside consultants
Competitive comparison

Marketing mix
Product
Price
Promotion
Place

Target Marketing
Ability to meet need
Cost of serving need
Current/potential customer profile
Demographics/psychographics
Current/potential income
Number/strength of competitors
Physician-to-physician referral marketing
Physician-to-managed care marketing
Physician-to-corporate marketing
Market segmentation/stratification
Market share
Market development/penetration

Planning and Marketing Task 3: continued

Product/service lines
Service assessment
Supply and demand
Service expansion
Product features vs. benefits
Product life cycle
Alternative income sources
Customer desires/buying triggers

Pricing
Pricing strategies
Product costing
Competitive comparison
Payor considerations
Legal ramifications
Discounts/sliding scale
Uninsured/pro bono policy

Place
Distribution of service
Geographic coverage
Location of services
Satellite offices
Off-site (e.g., schools, community clinics)
Hospital affiliations
Provider panel expansion

Promotion
Advertising
Public relations/publicity
Customer relations
Community relations
Staff relations
Media relations
Personal promotion

Organization, structure and culture
Style/image of practice
Structure of practice
Systems of practice
Culture of practice
Practice niche or uniqueness

Planning and Marketing Task 3: continued

Advertising concepts
Communication channels
Brand creation, branding strategy
Key messages, graphics/logos, tag lines
Corporate image, visibility
Practice identity
Signage
Cooperative advertising
In-office marketing
Content, reading level of marketing materials
Targeting for each market
Marketing materials design
TV, radio, Internet options
Competitor positioning/image

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Planning and Marketing Task 4:
Monitor and evaluate effectiveness of strategic,
business and marketing plan activities

Core Planning and Marketing Knowledge for Task 4

Reassessment of plans
Importance of ongoing evaluation
Variance analysis
Feedback techniques
Survey methods
Analysis/measurement techniques
Outcomes/results
Practice benchmarking
Market research

Plan modification
Ongoing consensus building
Interpretation of data, results
Conflict management
Ongoing physician, staff education
Adjusting goals, objectives, budget
Revising business/marketing plans

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Planning and Marketing Task 5:
Pursue and establish partnerships and strategic alliances

Core Planning and Marketing Knowledge for Task 5

Integration principles
Financial considerations
Capitalization of medical groups
Merger/acquisition implications
Consolidation ramifications
Contracting network
Decentralized network
Strategic planning

Personnel implications
"Same desk" rule
Benefits, pensions, reporting relationships
Managing change reactions, resistance
Participation in change process
Group culture considerations
Licenses, credentialing
Compensation adjustments

Risk analysis
Stark legislation
Safe harbors
Real estate considerations
Pro forma budgets
Cash flow projections
Capital asset valuations
Accounts receivable (A/R) valuations
Banking/lending relationships
Restrictive covenants

Due diligence process
Operational
Marketing
Legal
Financial
Accounting/tax implications
Physician employment agreements/compensation
Governing structure
Bylaws, documents
Ownership
Naming rights
Negotiation/merger communication
Board, administrator roles
Legal counsel
Investment bankers
Accountants/financial advisers
Consultants/facilitators

Planning and Marketing Task 5: continued

Affiliation models
IPA
PPO
PHO
IDS
MSO
Medical division/Employment model
Group practice model
Foundation model
Physician equity model
PPMC
Joint ventures

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Planning and Marketing Task 6:
Develop and implement community outreach,
public relations and customer relations programs

Core Planning and Marketing Knowledge for Task 6

Patient education
Patient handbooks
Patient communication protocol
Internet/Web "tele-health" methods
Brochures
Educational materials (video, audio, print)

Community focus/collaboration
Community definition
Population profile vs. community
Awareness building
Targeted messages
Sensitivity to cultural issues
Standards of acceptance
Community involvement
Volunteer involvement
Health fairs, free clinics
Pro bono/charitable care
Community coalitions

Analysis of community health risks
Community health risk assessment instruments
Collection/analysis of clinical data
Promotion of key clinical practices
Identification of major issues
Involvement in uninsured solutions

Wellness/health benchmarks
Awareness of good health principles and concepts
Behavioral change
Health status improvement
Disease management results

Public relations methods
Open houses
Speakers' bureau
Newspaper articles/columns
Web site presentations
Physician referral newsletter
Business cards
Service brochure

Publicity
News releases
Media coverage
Medical media opportunities

Planning and Marketing Task 6: continued

Internal relations
Staff newsletter
Staff meetings with senior management
Intranet communications
Suggestion boxes

Stakeholder identification and management
Characteristics
Needs
Expectations
Customized communications

Survey techniques
Marketing feedback
Operational improvement evaluation
HEDIS guideline results

Operational improvements/best practices
Organizational development
Change management tools
Organizational culture, dynamics
Customer service practices
Telephone etiquette
Reception desk etiquette
Dealing with difficult people
Dealing with demanding patients
Dealing with dissatisfied customers
Role modeling with physicians
Physician "bedside manner"
Satisfaction surveys

Return to *Planning and Marketing Task Table*.

Find *books and other products on Planning and Marketing*.

Find *educational resources* on Planning and Marketing.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on *ACMPE certification*.

Technical/Professional Knowledge Performance Domain Four
Information Management: Skills, Tasks, Knowledge

Information Management Skills

Key information management skills for medical practice executives are:

- *Assessing short-term/long-term information technology (IT) needs of medical practice and developing RFI/RFP to ensure comprehensive response from vendors.*

- *Evaluating vendor proposals and working with physician and staff selection committees to determine best fit for practice.*

- *Negotiating vendor contracts to ensure best possible price, support and servicing for the medical practice.*

- *Planning and implementing initial and ongoing training to allow physicians and staff to make best use of IT.*

- *Persuading physicians and staff to use electronic resources to meet their education, certification and credentialing needs.*

- *Communicating to physicians and staff the need to maintain IT security to ensure accountability, confidentiality and integrity of system.*

- *Analyzing database needs and planning comprehensive database systems development to meet multiple practice management needs.*

Information Management Tasks

Medical practice executives must ensure that the following information management tasks are carried out in the practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:   *Conduct information system needs analysis.*

TASK 2:   *Facilitate information system procurement and installation.*

TASK 3:   *Develop and implement information system training and support programs.*

TASK 4:   *Oversee database management and maintenance.*

TASK 5:   *Develop information network security systems.*

TASK 6:   *Provide access to electronic education and information resources and systems.*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

Information Management Knowledge by Task

Information Management Knowledge for Task 1:
Conduct information system needs analysis

Core Information Management Knowledge for Task 1

Current systems
Existing applications/tools
Practice management scheduling, billing systems
Automated phone reminder systems
Referrals/authorizations
Claims processing/eligibility/appeals
Electronic medical records
Prescription management/writing
Database management
Disease management
Productivity tools/handheld devices
Transcription/voice recognition systems
Integrated portals
Physician/staff satisfaction

IT architecture planning
Mission/vision for organization
Executive direction for IT
Management issues
Business need changes
Application architecture/software trends
Future database needs
Services (e.g., e-mail, groupware)
Facilities/space
Capital investment, ongoing cost
Outsourcing
Virtual visits
Application service providers
Evidence-based medicine
Informatics tools
Online recruitment
Payor data tracking

Patient applications
Telehealth
Physician-patient electronic communications
Care management
Electronic monitoring
Physician Web sites
Patient education from practice, from Internet
Medical smart cards
Internet care delivery

Information Management Knowledge for Task 1: continued

Change processes
Brainstorming method
Players/participation
Timeframe
Planning/evaluation tools
Roles, responsibilities
Communication plan
Readiness for change assessment

Return to *Information Management Task Table*.

Find *books and other products on Information Management*.

Find *educational resources* on Information Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Information Management Task 2:
Facilitate information system procurement and installation

Core Information Management Knowledge for Task 2

Prequalification phase
Identification of vendors
Trade shows
Trade publications
MGMA resources
Internet

Request for information (RFI)
RFI development/distribution
Strategy preferred (portal, niche player, solutions provider)
Response analysis
Company reviews
Stock reviews
Better Business Bureau check
Determination of finalists

Request for proposal (RFP)
Selection criteria
Practice profile
Practice goals/constraints
Price range
Delivery timeline
Ongoing service
References/portfolio
Specific platform
Other criteria

Decision making
Finalist reference checking
Selection committee
Analysis of trade-offs
Decision
Implementation plan

Return to *Information Management Task Table*.

Find *books and other products on Information Management*.

Find *educational resources* on Information Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

*Information Management Knowledge for Task 3:
Develop and implement IT training and support programs*

Core Information Management Knowledge for Task 3

Needs assessment
Survey of physician expertise/needs
Survey of staff expertise/needs
Survey of preferred training methods
Analysis of time needed
Analysis of costs

Planning
Budgeting
Scheduling
Equipment needs
Instructors (internal, external)
Off-site, on-site

Implementation
Schedule options
Make-up options
Training/reference materials
Evaluation of instruction
Ongoing support

Return to ***Information Management Task Table***.

Find ***books and other products on Information Management***.

Find ***educational resources*** on Information Management.

Take an objective ***knowledge assessment*** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Information Management Knowledge for Task 4:
Oversee database management and maintenance

Core Information Management Knowledge for Task 4

Database selection
Needs assessment
Buy/rent vs. build
Contract/custom development

Management
Responsibilities, roles
Policies, procedures
Types of data
Patient care billing
Closings (daily, monthly, yearly)
Report generation/distribution
Custom reports

Maintenance
System administration
Disaster management
Policies, procedures
Staff roles

Return to *Information Management Task Table*.

Find *books and other products on Information Management*.

Find *educational resources* on Information Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

*Information Management Knowledge for Task 5:
Develop information network security systems*

Core Information Management Knowledge for Task 5

Health Insurance Portability and Accountability Act (HIPAA)
National provider identifier
Electronic transactions
National standard employer identifier
Standards for security and electronic signatures
National health identifier for individuals
Standards for individually identifiable health information

Accountability
Authorized access to information
Authentication technology
Encryption
Physical access control

Confidentiality
Policies, procedures
Legislation
Proper use
Proper disclosure
Proper release

System Integrity
Data protection from tampering
Firewall and other safeguards
Accuracy of data
Maintenance of data
Communication/education
Board/administration responsibilities
Physician responsibilities
Staff responsibilities
Monitoring
Consequences

Return to *Information Management Task Table*.

Find *books and other products on Information Management*.

Find *educational resources* on Information Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Information Management Knowledge for Task 6:
Provide access to electronic education and information resources and systems

Core Information Management Knowledge for Task 6

Resource options
MGMA knowledge base
Internet options
Applicable professional organizations
Academic institutions

Equipment/software/media options
Computer
Video
Audio
CD-ROM
Interactive

Management
Practice priorities and topics for clinical and administrative training
Communication of options
Support for education
Scheduling flexibility
Evaluation of results

Return to *Information Management Task Table*.

Find *books and other products on Information Management*.

Find *educational resources* on Information Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on *ACMPE certification*.

Technical/Professional Knowledge Performance Domain Five
Risk Management: Skills, Tasks, Knowledge

Risk Management Skills

Key risk management skills for the medical practice executive are:

- *Continually assessing potential medical practice risks to prevent malpractice suits, loss control issues and government claims of abuse.*

- *Communicating consistently to medical practice staff via most appropriate media the commitment to minimize risk and maximize compliance to ensure high-quality patient care.*

- *Interpreting government regulations on corporate compliance, fraud/abuse to physicians and staff to promote adherence.*

- *Building/maintaining relationships with legal counsel to ensure most appropriate resources on practice liability matters.*

- *Planning security systems and education to minimize possible workplace violence in the medical facility.*

- *Writing and communicating clear policies on medical practice risk and compliance matters, including medical records, self-referral and patient safety to limit risk exposure.*

- *Investigating all claims against the practice and its physicians and staff to ensure patients and staff are treated correctly.*

- *Negotiating contracts (including capitation agreements) with payors, contractors, vendors and other outside resources to eliminate risks for the practice.*

- *Reporting regularly to the board, administrators and staff on risk-related matters to ensure up-to-date understanding of liability issues for the practice.*

- *Evaluating future risks for the practice in light of past/present history and forecasted trends to ensure adequate preparation for the future.*

Risk Management Tasks

Medical practice executives must ensure that the following major risk management tasks are carried out in the medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:   *Maintain legal compliance with corporate structure*

TASK 2:   *Maintain corporate history and develop record-keeping procedures*

TASK 3:   *Develop conflict resolution and grievance procedures*

TASK 4:   *Assess and procure liability insurance*

TASK 5:   *Establish personnel and property security plans and policies*

TASK 6:   *Develop and implement quality assurance and patient satisfaction programs*

TASK 7:   *Establish patient, staff and organizational confidentiality policies*

TASK 8:   *Conduct audits of at-risk financial activities*

TASK 9:   *Develop professional resource networks for risk-related activities*

TASK 10:   *Negotiate and comply with contractual arrangements*

TASK 11:   *Maintain compliance with government contractual mandates*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

Risk Management Knowledge by Task

Risk Management Knowledge for Task 1:
Maintain legal compliance with corporate structure.

Core Risk Management Knowledge for Task 1

Knowledge of federal, state, local laws/regulations
Corporate and business law
C vs. S corporation
LLC vs. general partnership
For-profit vs. nonprofit
Foundation
Antitrust
Federal funding
OSHA
ADA
FMLA
ERISA
Networks
Provider legislation
Antikickback
Stark law

Legal relationships
Attorney in general practice
Attorney specialists
Legal resource capabilities/utilization
Relationship with legal counsel
Legal system
Arbitration/mediation rules/skills

Leadership liability
Board
Officer
Decisions
Obligations (to speak up on issues, to know when to seek legal counsel)
Rules of discovery
Liability insurance (e.g., professional/personal)
Civil vs. criminal law
Medicare fraud and abuse
Tax numbers, billing, contracts
Corporate compliance plan
Corporate structural changes
De-merger

Risk Management Knowledge for Task 1: continued

Assessment/decision making

Cost/benefit assessment of suits
Options/choices
Assessment of need for negotiation
Settlements

Governance development/policy adherence

Governance structure
Governance policies/procedures
Board member personalities/relationships/interactions
Right to due process

Risk management strategy

Risk management plan
Identification of risk exposures/loss experience
Peer review and evaluation of care
Ongoing monitoring of corrective actions
Importance of immediate investigation of potential claims
Staff participation
Identification/isolation of suspect medical equipment/supplies
Notification of manufacturers/suppliers
Gathering of evidence related to actual/potential litigation
Documentation of risk management activities

Corporate compliance

Board/executive commitment
Appointment of compliance officer
Education (physicians/staff/patients/volunteers/contractors)
Prevention of fraudulent practices (billing, documentation)
Incorrect reimbursement
Record falsification/alteration
Inappropriate acceptance of gifts
Billing errors
Continuation of unneeded/unauthorized care
Inadequate documentation of patient care
Inadequate patient information (e.g., informed consent, anticipated charges, rights/responsibilities)
Inadequate reference-checking before hiring
Inadequate training
Insufficient physician participation in medical record/billing audits
Patient discrimination
Client abuse
Inadequate safety plan for patients, staff
Inadequate system for reporting compliance violations/concerns
Lack of accusation follow-up and correction

Risk Management Knowledge for Task 1: continued

Communication plan
Target audiences (board, administration, physicians, staff, patients, public)
Oral/written presentations/communications
Corporate communications
Public relations
Damage control
Employee education

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 2:
Maintain corporate history and develop record keeping procedures

Core Information Management Knowledge for Task 2

Corporate record-keeping
Articles of incorporation
Bylaws
Bylaw changes/documentation
Robert's Rules of Order
Discovery
Paper trail
Stock/outstanding shares
Minutes (board, committee)
Employment agreements (physician, administrator, other)
General ledger
Rules, expirations, limits, renewals, vicarious liability
Corporate history (founding, annual reports, milestones)
Disclosure
Medical records
Physician credentials/licenses
National Practitioner Data Bank

Computer aids for recording history
Database
Spreadsheets
Word processing
PowerPoint
E-mail (when to use/not use)
Redlining changes
Fundamentals of PCs and hardware/software

Record system organization
Efficiency/flow
PERT chart
What to keep/how to keep
How long to keep
Storage (database, paper, filing)
Distribution

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 3:
Develop conflict resolution and grievance procedures

Core Risk Management Knowledge for Task 3

Labor and administrative law
Local, state, federal
Grievance procedures
Mediation process
Arbitration laws
Union relations
Malpractice matters

Grievance procedures
Claims appeals, denials, referrals
Patient complaints
Insurance commissioner
Whistle blowers
Sexual/workplace harassment
Inadequate care
Refusal to take patient under care/discharge of patient
Internal hotlines

Complaint investigations
Fact-finding
Interpretation of legal mandates and restrictions
Problem solving
Mediation
Resolution
Documentation

Return to **Risk Management Task Table**.

Find **books and other products on Risk Management**.

Find **educational resources** on Risk Management.

Take an objective **knowledge assessment** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 4:
Assess and procure liability insurance

Core Risk Management Knowledge for Task 4

Insurance requirements/products
Malpractice
Board/officer liability
Property and casualty
Vehicle
Analysis of insurance providers/products
Contract negotiations
Underwriting, self-insurance

Risk/benefit analysis
Current/potential insurance policies
Loss ratios/loss experience (past history)
Premiums/costs
Benefits of insurance

Organizational commitment
Board
Physicians
Administrators
Medical ancillaries
Nonmedical staff

Return to **Risk Management Task Table**.

Find **books and other products on Risk Management**.

Find **educational resources** on Risk Management.

Take an objective **knowledge assessment** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 5:
Establish personnel and property security plans and policies

Core Risk Management Knowledge for Task 5

Federal, state, local laws/regulations
Sexual/workplace harassment
Workplace violence
Patient confidentiality
FLSA
OSHA

Policies
Security plan
Disruptive physicians/staff/patients
Formulation of policies/procedures
Solution-based systems
Training
Documentation

HR investigation tactics
Physical inspection (lockers, desks)
Personal interviews
Record review
Interpretation of findings
Standards/measurements
Delegation
Training
Documentation

Monitoring techniques
Legal/appropriate
Surveillance laws
Substance abuse
Pre-employment physicals
Pre-employment reference checks
Privacy/confidentiality

Patient privacy protection
Patient information
Staff training
Staff suspension/termination

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 6:
Develop and implement quality assurance and patient satisfaction programs

Core Risk Management Knowledge for Task 6

Capitation contracting
Contract requirements
Cost/patient
Rates/fees
Liability
Credentialing

Quality management
Standards/quality monitors
Measurement of outcomes
Feedback systems
Utilization of feedback
Quality improvement process
Training

Utilization Management

Patient satisfaction
Survey instruments (written, phone interview)
Frequency
Content
Data analysis
Distribution/communication
Follow up/corrective actions
Performance evaluation use

Federal, state, industry laws/standards
Interpretation of regulatory guidelines
Quality reporting agencies
Surveys, audits
Distribution of findings

Malpractice risks
Incompetent/impaired physicians
Prescription errors (poor writing, incorrect medications/dosage)
Unnecessary procedures
Physician misconduct
Safety issues (equipment/supplies, facility, environmental hazards)
Medical errors (diagnosis, treatment)
Lack of physician/staff training
Inadequate documentation

Risk Management Knowledge for Task 6: continued

Medical service delivery system
Medical management
Patient flow plan
Patient intervals
Appointment scheduling
Flow charting internal operations
Standards

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 7:
Establish patient, staff and organizational confidentiality policies

Core Risk Management Knowledge for Task 7

Federal, state, local laws/regulations
HIPAA
Medical records safekeeping

Organizational information flow
Appointment scheduling
Check-in
Ancillary staff
Physicians
Medical records/data processing staff
Billing staff
Administration (reports, analysis)

Policies/procedures
Medical records
Release of information
Training
Documentation
Court testimony
Management responsibilities

Return to **Risk Management Task Table**.

Find **books and other products on Risk Management**.

Find **educational resources** on Risk Management.

Take an objective **knowledge assessment** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

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Risk Management Knowledge for Task 8:
Conduct audits of at-risk financial activities

Core Risk Management Knowledge for Task 8

Federal, state, local tax codes
Up-to-date information
Ongoing education
Outside consultants (e.g., CPA)
Industry application

Generally Accepted Accounting Principles (GAAP)
Applicable for medical practice
Applicable for for-profit/nonprofit
Current standards
Continuing education

Systems analysis models/procedures
Financial forecasting
Financial models
Software applications

Accounting/auditing systems
Cost reports/analysis
Industry comparisons

Tax reports/ returns
Preparation (in-house, external CPA)
Board philosophy/strategy
Administrative follow-up

Reports
Exception reports
Cost reports
Tax estimates
Forecasts

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 9:
Develop professional resource networks for risk-related activities

Core Risk Management Knowledge for Task 9

Consultative resources
Applicable
Current
Potential
Legal
Financial
Tax
Insurance
Industry

Contract negotiation
Expertise needed/provided
Amount of service needed
Risk assessment
Cost/benefit

Current/future risk-related issues
Past risk history
Present risks/suits
Potential risks
Most vulnerable areas

Return to **Risk Management Task Table**.

Find **books and other products on Risk Management**.

Find **educational resources** on Risk Management.

Take an objective **knowledge assessment** of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 10:
Negotiate and comply with contractual arrangements

Core Risk Management Knowledge for Task 10

Contract negotiation
Payors
Physicians
Contractors
Vendors

Health care law
Industry information
Legal counsel
Peer discussion

Needs assessment
Past contractual experience
Present situation
Future needs
Competitive analysis
Trend analysis

Return to *Risk Management Task Table*.

Find *books and other products on Risk Management*.

Find *educational resources* on Risk Management.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Risk Management Knowledge for Task 11:
Maintain compliance with government contractual mandates

Core Risk Management Knowledge for Task 11

Contract law
Industry updates
Legal updates/advice
Board, administration education
Research

Federal, state, local HR laws/regulations
Safety
Privacy
Leave
Health
People with disabilities

Self-referral laws/regulations
Stark law
Compliance issues
Physician education
Monitoring/follow up
Policies/plans

Fraud/abuse laws/regulations
Medicare
Compliance plan
Physician/staff education
Monitoring/follow up
Policies/plan

Record keeping
Policies
Education
Patient confidentiality
Safekeeping/security
Storage
Access/release

Return to **Risk Management Task Table**.

Find **books and other products on Risk Management**.

Find **educational resources** on Risk Management.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on **ACMPE certification**.

Technical/Professional Knowledge Performance Domain Six
Governance and Organizational Dynamics: Skills, Tasks, Knowledge

Governance and Organizational Dynamics Skills

Key Governance and Organizational Dynamics skills for
the medical practice executive are:

- *Communicating mission/vision/values/decisions to influence the strategic direction of the medical practice.*

- *Using negotiation skills to reach consensus on critical issues while maintaining trust and relationships with key constituents.*

- *Resolving conflicts in ways that create energy and motivation for appropriate change in the medical practice.*

- *Using assessment/survey tools to gain important data for the medical practice on stakeholders, situations and personalities.*

- *Displaying self-confidence and leadership skills to balance professional integrity and quality care with appropriate results for the practice.*

- *Facilitating decision-making, conflict resolution, strategic planning and dialogue to move the medical practice forward.*

- *Presenting information in an organized way using appropriate media, settings, verbal and listening skills and body language to gain attention and achieve specific objectives for the practice.*

- *Planning for the future, setting goals and assigning responsibility/accountability to maximize individual and practice performance.*

- *Building trust and relationships to motivate individuals and groups to become effective medical practice teams.*

- *Use coaching methods to teach and reinforce desired performance.*

- *Teaching the benefits of standard business/financial practices to achieve quality patient care.*

- *Fostering participation in self-assessment and continuous learning programs for everyone in the practice, including administrator.*

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Governance and Organizational Dynamics Tasks

Medical practice executives must use the above skills to ensure that the following tasks are carried out in a medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:   *Lead and manage the organizational change process for practice improvement*

TASK 2:   *Construct and maintain governance systems*

TASK 3:   *Evaluate and improve governing bylaws, policies, processes*

TASK 4:   *Conduct stakeholder needs assessment and facilitate relationship development*

TASK 5:   *Facilitate staff development and teaming*

TASK 6:   *Facilitate physician understanding and acceptance of good business management*

TASK 7:   *Develop and implement quality assurance programs*

Click for the *glossary* of abbreviations and terms used in the task descriptions.

Governance and Organizational Dynamics Knowledge by Task

Governance and Organizational Dynamics Task 1:
Lead and manage the organizational change process for practice improvement

Core Governance and Organizational Dynamics Knowledge for Task 1

Group dynamics
Group culture
Individual personalities, skills
Organization politics, power
Group interactions
Problem-solving, decision-making patterns
Focus, follow-through

Change-agent management
Environmental change triggers
Organizational planning
Change theory
Need/motivation for change
Formal vs. informal leadership
Resistance to change, acceptance
Trust building
Negotiating/implementing change
Process improvement techniques
Operational knowledge
Continuous teaching/learning

Performance goals
Choice of goals, objectives, outcomes
Performance expectations
Commitment to goals
Coaching/mentoring
SMART (specific, measurable, active, realistic, timely) objectives
Prioritization of goals
Measurement of outcomes
Implementation, impacts

Meeting management
Written agenda
Logistics
Structure
Purpose, objectives
Participants
Start/stop times
Role of chair, facilitator, recorder
Rules of conduct
Focus on strategic issues
Action plan
Verbal, written summary

Governance and Organizational Dynamics Task 1: continued

Managing expectations
Statement of expectations
Behavioral expectations
Business expectations
Personal expectations
Blend of diverse expectations
Relationship to goals

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 2:
Construct and maintain governance systems.

Core Governance and Organizational Dynamics Knowledge for Task 2

Strategic planning process
Definition/purpose
Expectations for process
Outside professional resources, facilitation
Conflict management, consensus building
Development of mission, vision, value statements
External trend analysis
Internal status analysis
Planning process, meeting agendas
Cost/benefit analysis
Relationship of strategic plan to operational plan
Constituencies, culture, hidden agendas
Blending diverse views into coherent strategy

Organizational communication pathways
Formal vs. informal
Organizational structure design
Consistent message
One leadership voice
Communication containment/firewalls
Repetition, reinforcement via diverse methods

Physician-administrative teaming principles
Definition of roles, team role
Trust in each other
Dialogue as priority
Unity, speak as one
Value of each to organization
Appreciation of style/skill differences
Conflict management/consensus building
Complementary management
Respect, recognition
Selection of team players based on skill vs. seniority
Formal recognition of roles, group buy-in
Leadership team

Governance and Organizational Dynamics Task 2: continued

Applicable governance structure
Communication of the structure, decision-making process
Choice of the appropriate governance structure (managing partner, strict partnership, professional corporation, regular corporation, representative group, one leader vs. executive committee)
Definition of governance vs. leadership
Role of committees and chairs
Accountability of all roles
Responsibility, authority assigned
Governance vs. management
Balance between physician expectations for results and desire to influence process
Empowerment of leadership to enact board policies/decisions
Bylaws, articles of incorporation
Legal ramifications of structure, policies, compliance
Creation, amendment of legal documents

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 3:
Evaluate and improve governing bylaws, policies, processes

Core Governance and Organizational Dynamics Knowledge for Task 3

Board composition and meeting procedural rules
Board membership
Board evaluation
Needs of stakeholders
Stakeholder survey
Meeting conduct
Board member job descriptions
Board orientation
Board management by chair
Organizational legal documents
Legal counsel
Corporate laws
Living, changing documents
Articles of incorporation
Bylaws, changes
Robert's Rules of Order
Stock issued, ownership/number
Stockholder agreements
Employment agreements
Board/committee meeting minutes
Financial reports, general ledger
Paper trail
Disclosure
Legal vs. illegal discovery
Insurance, malpractice, directors and officers, liability

Organizational history
Culture maintenance
Corporate/institutional history
Tribal knowledge
Key written documents
Key photographic materials
Record retention, legal requirements
Systems for maintenance (e.g., database, paper, microfilm)

Survey techniques
Survey methodology
Evaluation of survey techniques
Survey result validation
Statistical analysis, probability theory
Action on results
Measurement analysis

Governance and Organizational Dynamics Task 3: continued

Cultural/group assessment
Assessment tools to survey personality, learning style, satisfaction, self,
issue identification, attitude
Analysis of assessment data to maintain group culture, set expectations
Feedback to assessment participants

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 4:
Conduct stakeholder needs assessment and facilitate relationship development

Core Governance and Organizational Dynamics Knowledge for Task 4

Organizational constituents and needs
Stakeholder analysis
Opposing incentives of internal/external stakeholders
Responsibilities of health care providers vs. business managers

Needs assessment methodologies
Community assessments
Community analysis of needs assessment
Community collaboration on priority needs

Program development
Focus group input, patient/payor education/education
Education of internal stakeholders about external stakeholders

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 5:
Facilitate staff development and teaming

Core Governance and Organizational Dynamics Knowledge for Task 5

Staff development techniques
Targeted learning experiences
Adult learning styles
Training models (e.g., computer-based, video, interactive, role playing, lecture/speaker, group discussions, books)
Educational technology (e.g., online training, software)
Power of optimism, positive thinking
Motivational theory
Celebration of successes, accomplishments
Relationships with academic and other outside resources
Development of middle managers

Human dynamics
Emotional health
Personality assessment
Communication/interpersonal skills
Group dynamics
Burnout
Self-management, time management

Physician, manager mindsets
Managers as process-oriented; physicians as immediate action-oriented
Physician as advocate for patient health; manager as advocate for organizational, population health
Management and leadership development

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 6:
Facilitate physician understanding and acceptance of good business management

Core Governance and Organizational Dynamics Knowledge for Task 6

Quality of patient care issues
Data collection for quality issue decisions (e.g., patient satisfaction, cost effectiveness, referrals)
Patient perceptions of compassionate care vs. clinical care
Informed consumer/patient
Collaboration with patient on care management

Organizational goals
Conflict with personal goals
Alignment with mission/vision/values
Alignment of individual and organizational goals
Recruitment of individuals aligned with organizational goals

Clinical staff background, expectations
Labor shortages
Strategies making organization employer of choice
Clinical background
Physician sensitivity to staff needs/values
Delegation to mid level/other providers

Patient safety
Medical errors
Legibility of physician handwriting
Miscommunication, inadequate communication
Inadequate training

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Governance and Organizational Dynamics Task 7:
Develop and implement quality assurance programs

Core Governance and Organizational Dynamics Knowledge for Task 7

Team building
Organizing/maintaining teams
Empowering teams
Developing trust
Training
Recognition, reward
Celebration

Industry quality benchmarks
Objective, accurate, timely data
Data collection agencies (e.g., JCAHO, HEDIS, NCQA)
Accreditation process
Satisfaction surveys
Organizational assessments
Self-assessments
Feedback loops to teams

Financial models
Cost-effective performance expectations
Financial data for managers/physicians to influence financial performance
Management/cost accounting (cash vs. accrual, fixed vs. variable, direct vs. indirect)
Forecasting models (pro forma, cash flow, statistical, cost/benefit ratio, benchmarking)
Budgeting
Contribution margin analysis
Retained earnings model
Financial statements, cash flow

Clinical requirements to meet patient and organization needs
Medical assessment, diagnosis development, referral process, documentation
Teamwork promotion
Customer expectations
Clinical requirements to provide quality care

Return to *Governance and Organizational Dynamics Task Table*.

Find *books and other products on Governance and Organizational Dynamics*.

Find *educational resources* on Governance and Organizational Dynamics.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click here to find out more information on *ACMPE certification*.

Technical/Professional Knowledge Performance Domain Seven
Business and Clinical Operations: Skills, Tasks, Knowledge

Business and Clinical Operations Skills

Key business and clinical operations skills for the medical practice executive are:

- *Using project management techniques to plot and improve the practice's business and clinical operations.*

- *Visualizing and stating desired operational outcomes, checking progress through quality indicators, aligning with mission.*

- *Involving physicians in strategic/operational planning, facilities design and clinical pathway mapping to meet their needs and benefit the entire organization.*

- *Using financial budgeting/accounting/forecasting models to obtain relevant benchmarking information for process improvement.*

- *Using satisfaction survey techniques to identify expectations of physicians, payors, patients.*

- *Maximizing knowledge of human resource management to recruit and retain appropriate staff, including temporary help and outsourced contractors.*

- *Resolving scheduling conflicts to ensure patient satisfaction and best use of physician/staff resources.*

* *Negotiating win-win purchasing contracts/maintenance agreements to ensure productive vendor/supplier relationships.*

- *Designing space/facilities to maximize physician/staff space and time.*

- *Choosing training techniques/media to achieve ongoing education for protocols, technologies.*

- *Evaluating and implementing new technologies to facilitate reimbursement, patient education, and physician research.*

- *Monitoring licensure/certification/credentialing to ensure qualified, legal staffing.*

Business and Clinical Operations Tasks

Medical practice executives must use the above skills to ensure that the following tasks are carried out in a medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1:	*Facilitate business operations planning*
TASK 2:	*Conduct staffing analysis and scheduling*
TASK 3:	*Develop ancillary clinical support services*
TASK 4:	*Establish purchasing procurement and inventory control systems*
TASK 5:	*Develop and implement facilities planning and maintenance programs*
TASK 6:	*Establish patient flow processes*
TASK 7:	*Develop and implement patient communication systems*
TASK 8:	*Develop clinical pathway structure and function*
TASK 9:	*Create monitoring systems for licensure, credentialing and recertification*
TASK 10:	*Develop and implement process improvement programs for clinic operations*

Click for the ***glossary*** of abbreviations and terms used in the task descriptions.

Business and Clinical Operations Knowledge by Task

Business and Clinical Operations Task 1:
Facilitate business operations planning

Core Business and Clinical Operations Knowledge for Task 1

Strategic planning
Need/importance of strategic plan
Strategic plan as foundation for operational plan
Planning process, meeting agendas
Cost/benefit evaluation of planning
Mission, vision, values statements
Utilization of professional outside resources
Conflict resolution, consensus building

Operational planning
Need/importance of operational plan
Operational plan as foundation for budget, department plans
Alignment with mission, vision
Alignment with resources
Strategy formulation, alternatives
Physician role
Administrator role

Strategies and tactics
Components of operational plan
Definition of strategy
Definition of tactics
Tactical action plan
Project management techniques

Organizational structure and culture
Need for organizational change strategy based on strategic/operational plans
Strategies and tactics consistent with culture
Plan as framework for change-management processes
Internal and external demographic factors
Personal dynamics/preferences
Cultural barriers
Location impact on culture
Physician naivete about change processes
Physician buy-in
Practice of medicine vs. business of health care

Return to **Business and Clinical Operations Task Table**.

Find **books and other products on Business and Clinical Operations**.

Find **educational resources** on Business and Clinical Operations.

Take an objective **knowledge assessment** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 2:
Conduct staffing analysis and scheduling.

Core Business and Clinical Operations Knowledge for Task 2

Staffing/scheduling financial fundamentals

Financial forecasting models
Financial/accounting staffing/scheduling applications
Software applications
Analysis/communication of financial data
Business ratios and benchmarking, break-even strategy
Revenues/expenses of staffing/scheduling
Panel size impact

Personnel management factors

Human resources policies and practices
Wage/salary administration
Employee classifications/position types
Staff/cultural expectations
Industry norms
Union environment

Personnel staffing

Workforce planning based on strategic/operational plans
Labor market analysis
Staffing analysis
Job analysis, job descriptions
Assessment of team needs
Staffing impact on space
Recruitment/outsourcing
Working hours/shifts

Patient/staff/physician satisfaction

Service expectations
Physician expectations
Staff expectations
Formal/informal survey processes
Quality indicators

Patient/staff safety

Coverage for patient load
Staff training
Patient education
Environmental hazards
Medical error reduction
Safety/health issues
Prescription readability
Exposure control
Biohazard disposal
Hazard communication program
Infection control/hand-washing/universal precautions
Protective gear
Workers' compensation

Business and Clinical Operations Task 2: continued

Scheduling
Patient flow
Appointment scheduling protocols
Manual scheduling
Automated scheduling
Phone protocols
Appointment status checks
Appointment confirmations
Chronic no-shows
Block/modified wave scheduling
Impact on administrative/clinical performance
Same-day appointments/emergency calls
Surgery scheduling
Impact on facility design/utilization

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 3:
Develop ancillary clinical support services

Core Business and Clinical Operations Knowledge for Task 3

Ancillary services
Laboratory services
Radiology services
Pharmacy services
Rehabilitation services
In-house vs. outsourcing
Complementary therapies
Reimbursement methodologies
Labor availability
Service protocols

Certification and licensing regulations for ancillaries
Federal and state regulations
Accrediting organizations
Midlevel provider and other allied health clinician regulations
Validation of credentials
Source document acquisition/maintenance
Risk liability issues
OIG sanctions
Requirements of different professions

Clinical quality standards
Laboratory regulatory standards
Clinical quality assurance
Specialty-specific standards
Proficiency/competency testing
Outcomes measures

IS ancillary service applications
IS application interfacing
Compatibility
Management/communication of information
Collateral hardware
Reports for medical charting
Electronic medical records
Resource knowledge and product evaluation
Shelf life
HIPAA
Data security
Patient confidentiality
Backup issues, disaster management plan

Business and Clinical Operations Task 3: continued

Evaluation methods
Survey methodology
Alignment with strategic/operational plan
Financial analysis

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 4:
Establish purchasing, procurement and inventory control systems

Core Business and Clinical Operations Knowledge for Task 4

Purchasing policies, procedures, standards
Purchasing controls
Authorization/approval
Budgeted/nonbudgeted items
Fixed assets
Pricing discounts
Vendor relations
Standardization of inventory and products
Governmental regulations
Ethical behavior

Purchasing procurement systems
Automated/manual methods
Timing of order/delivery
Request/fulfillment
Group purchasing
E-commerce options
Purchasing consortiums

Inventory control systems
Materials management policies
Manual tracking
Patient chargeables vs. nonexpendable supplies
Stock evaluation
Physician special orders
Shelf life
Inventory tracking software
Internal department tracking of supplies
Management of flow
Security

Cost/activity accounting
Cost information
Allocation to departments/patients/cost centers/payors

Equipment purchase process/maintenance agreements
Contract negotiations
Match of equipment with service
OSHA requirements
Maintenance bids
Maintenance scheduling

Quality/safety of supplies
Pharmaceuticals
Blood supplies
Injectables

Business and Clinical Operations Task 4: continued

Pharmacy
Regulatory issues
Prescription management
Prescription refills
Narcotic drug controls
Inventory forecasting
Security of controlled substances
Storage issues
Placement of supplies

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 5:
Develop and implement facilities planning and maintenance

Core Business and Clinical Operations Knowledge for Task 5

Facility design
Licensing, certification
Federal/state/local regulatory compliance
Safety considerations
Patient flow
Physician/staff work flow
Equipment needs
Patient aesthetics, comfort, privacy
Signage
Selection of location, size, parking
Environmental controls
Communications infrastructure
Landscaping/maintenance
Community acceptance and cultural sensitivity
Physician involvement
Planning board approval
Security, safety issues
Medical equipment and technology

Facility management
Federal, state/local laws and regulations
OSHA-related and ADA-related policies/procedures
Building certification by JCAHO, other accrediting organizations
Crime considerations, secure environment
Patient and employee safety
Housekeeping standards, cleaning schedules
Utilization data analysis
Inspection schedules
Mechanical, electrical, plumbing systems
Biohazard waste management/disposal
Fire control and evacuation
Safety committee

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 6:
Establish patient flow processes

Core Business and Clinical Operations Knowledge for Task 6

Patient flow/needs
Queuing theory
Process documentation systems
Flow charting
Floor manager
Cancellations
No-shows
Contingency planning
Barriers to flow
Daily management
Nonclinical staff patient flow protocols

Business requirements
Registration on-site, phone, Internet
Sign-in list, forms
Necessary signatures
Current/new patients
Financial screening/insurance verification/benefit eligibility
Medicare, Medicaid, commercial/noncommercial carriers
Secondary carriers
Posting, coding
Cash drawer
Documentation
Data entry
Billing
Collections
Bankruptcy
Noncovered services

Clinical requirements
Encounter management
Physician maximization
Clinical intake
Medical assessment
HIV/HCV considerations
Medical emergencies
Diagnosis development
Treatment plan
Informed consent
Patient education
Referral process
Problem patient discharge
Visit documentation

Business and Clinical Operations Task 6: continued

Patient access to services
Recall, reminder, rescheduling systems
Triage protocols
Patient inquires/callbacks
Appointment/scheduling information systems
Appointment delay period
Physician availability
Cancellation analysis
Physician extender delegation/supervision

Patient communication/confidentiality
Medical records
Results reporting to patients/others
Patient consent to information release
Record access protocols
Employee policies
Check-in/check-out protocols
Phone protocols
Waiting room protocol
Information system/data security
HIPAA regulations

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 7:
Develop and implement patient communication system

Core Business and Clinical Operations Knowledge for Task 7

Communication systems
E-mail
Telephones
Data pagers
Voice mail
Intranet/network infrastructure
Regulatory issues

Call center
Call flow
Greeting standards
Answering services
Triage systems
Training
Service orientation
Inbound systems for patient calls
Emergency call protocols

Internet-based technologies
Web page
Telemedicine
Telehealth patient communication
Electronic claims processing
Electronic data exchange
Physician research
Reference accuracy

Patient education systems
Training on computers
Interactive education
Patient research
Resources/references

Technological knowledge
Telephony
Data ports
Bandwidth
Telephone conferencing
Video conferencing
Outside resources
Integration/interface
Cost/benefit analysis
Shelf life

Business and Clinical Operations Task 7: continued

Staff training
New technologies
Computers for presentations/communications
Data processing
Word processing
Data analysis/reporting
Intranet/Internet

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 8:
Develop clinical pathway structure and function

Core Business and Clinical Operations Knowledge for Task 8

Clinical pathway structure and function
Multidisciplinary team involvement
Physician/clinical executive leadership
Administrator role: advocate, facilitator, champion, resource allocation
Organization-specific approach
Project development/management
Review/approval process
Implementation of clinical pathways
Financial accountability
Impact of redundancy
Variation reduction
Impact on quality of care, cost-effectiveness
Outcomes measurement
Involvement of external agencies, payors
Industry norms
Community collaborators
Continuity of care considerations
Clinical procedure maps
Clinical need vs. administrative need
Non clinical staff involvement

Continuous quality improvement
Quality assurance programs
Practice review
Chart reviews
Physician/payor/patient satisfaction
Patient advocacy program
Evaluation of utilization/satisfaction data
Evaluation of clinical outcomes data

Clinical outcomes data models and analysis
Data collection
Analysis, reporting
Utilization management for medical management
Decision-making for strategic/operational planning

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 9:
Create monitoring systems for licensure, credentialing and recertification

Core Business and Clinical Operations Knowledge for Task 9

Accrediting/Certification Bodies
AAAHC
JCAHO
Physician certification boards
Administrator certification boards

Identification of requirements
Personnel, services, facilities, equipment requiring licensures, certification, credentials
Interval/scheduling requirements
Applicable federal, state, local regulations
Physician credentialing
Physician privilege

Systems
Development of database of regulations, licenses, credentialing
Policy/procedure development
Implementation methods
Compliance communication
Progressive discipline
Corrective actions
Termination considerations
Process improvement program

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Business and Clinical Operations Task 10:
Develop and implement process improvement program for clinical operations

Core Business and Clinical Operations Knowledge for Task 10

Clinical practices/protocols
Coding documentation
Regulatory, payor compliance requirements
Program audits
Risk assessment
Identification of process improvement opportunities
Communication with physicians/staff, payors, patients, community

Process improvement methods
Flow charting
Survey techniques
Historical data comparison
Variation/trend analysis
Pilot programs
Process improvement implementation

Process improvement teaching techniques
Adult learning styles
Training models
Media: computer-based, video, interactive, role-playing, lecture/speaker, group discussion, books, etc.
Educational technology (e.g., online training, software)
Content match with training requirements

Return to *Business and Clinical Operations Task Table*.

Find *books and other products on Business and Clinical Operations*.

Find *educational resources* on Business and Clinical Operations.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on *ACMPE certification*.

Technical/Professional Knowledge Performance Domain Eight
Professional Responsibility: Skills, Tasks, Knowledge

Professional Responsibility Skills

Key professional responsibility skills for the medical practice executive are:

- *Understanding the concept and importance of professionalism and its key requirements.*

- *Assessing strengths and weaknesses in knowledge and skill base.*

- *Identifying assessment, educational and informational resources to meet needs for professional development.*

- *Understanding the personal benefits of certification to the individual, the health care organization and the field.*

- *Understanding the requirements for certification and effectively managing the advancement process.*

- *Identifying and pursuing other opportunities for achieving higher levels of excellence in the field.*

- *Managing the overload of information and stress generated from multiple and diverse situations that occur in the practice and in personal life.*

- *Developing a professional network and support system comprising mentors, coaches, subject matter experts and others.*

- *Providing guidance and mentoring to others.*

- *Developing a personal code of ethics.*

- *Explaining the importance of ethical considerations as part of the organization's decision-making process.*

- *Identifying and pursuing opportunities for making contributions to colleagues, the profession and the community.*

- *Providing leadership to catalyze the practice's commitment of resources and active participation in community service activities.*

Professional Responsibility Tasks

Medical practice executives must ensure that the following professional responsibility tasks are carried out in the medical practice (Click on a task number to find the core knowledge required to carry out that task):

TASK 1: Advance professional knowledge and leadership skills

TASK 2: Balance professional and personal pursuits

TASK 3: Promote ethical standards for individual and organizational behavior and decision-making

TASK 4: Conduct self-assessments

TASK 5: Engage in professional networking

TASK 6: Advance the profession by contributing to the body of knowledge

TASK 7: Develop effective interpersonal skills

Click for the *glossary* of abbreviations and terms used in the task descriptions.

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Professional Responsibility Knowledge by Task

Professional Responsibility Task 1:
Advance professional knowledge and leadership skills

Core Professional Responsibility Knowledge for Task 1

Professional education
Assessment of educational needs
Identification of education opportunities/locations
Evaluation of options
Management of time
Cost/benefit analysis

Information requirements
Industry regulations
Industry trends
Health care evolution
Business changes
Body of knowledge advances

Education/credentialing
Communication of importance to board
Self-commitment to credentialing
Promotion of continuing education to others
Plan for career advancement

Leadership skills
Self/peer assessment
Effectiveness with physicians, clinical staff
Interacting with industry peers
Partnership with board, administrative staff

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 2:
Balance professional and personal pursuits effectively to
maintain psychological and physical well-being

Core Professional Responsibility Knowledge for Task 2

Health/fitness
Assessment of health status (physical, psychological)
Awareness of benefits of health prevention/promotion
Commitment to fitness regiment (exercise, diet, sleep)
Burnout prevention
Compartmentalization of work/home responsibilities
Personal/professional boundaries

Relaxation techniques
Stress management tactics
Recreation/hobbies
Personal time-out
Family time
Sports
Flexible schedule

Self-assessment tools
Personal style assessment
Time usage assessment
Self-esteem assessment
Personal/professional goal-setting
Career assessment
Action plan/monitoring

External support/evaluation resources
Career counselor
Mentor/coach
Manager
Peers
Subordinates
Therapist

Time management techniques/models
Covey/seven habits of effective managers
Journal-keeping
Time log
Professional/personal balance

Return to ***Professional Responsibility Task Table***.

Find ***books and other products on Professional Responsibility***.

Find ***educational resources*** on Professional Responsibility.

Take an objective ***knowledge assessment*** of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 3:
Promote ethical standards for individual and
organizational behavior and decision-making

Core Professional Responsibility Knowledge for Task 3

Individual integrity
Commitment to personal/professional growth
Personal standards
Ethical principles
Moral code
Personal credibility
Personal/professional integrity/behavior
Respect, trust, courtesy for others
Management style

Organizational goals/culture
Organizational history/profile
Goals
Culture

Organizational integrity
Ethical practices
Ethics communication/education
Organizational values
Seeking constructive comments
Comparison with standards in similar organizations
Ethical assessment
Relationship/obligation to patient
Workplace diversity
Teamwork
Ethics and economics
Regulations, licensure, accreditation
Employer/employee relations
Ethical decision-making
Health care service orientation
Community/societal focus

Ethical behavior
Board
Physicians
Staff
Stakeholders
Ethics committee
Ethics audit
External relations/feedback
Staff participation in setting/maintaining standards
Addressing ethical dilemmas
Patient rights, confidentiality
Charity care
Conduct of professional conduct

Professional Responsibility Task 3: continued

Standard setting
Identification of appropriate standards for organization and constituents
Contemporary industry standards
Responsibility to community/society
Fee setting
Balance between organizational viability and consumer demands
Theoretical bases for ethics and law
Legal liability to patients
Withholding/withdrawing treatment
Incompetent patients
Relations with contractors
Abusive situations
Confidentiality/disclosure

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 4:
Conduct self-assessments

Core Professional Responsibility Knowledge for Task 4

Competency requirements
General competencies
Professional knowledge and skill requirements

Professional Knowledge and Skill Assessment
Purpose and requirements for certification
Objective tests
Knowledge assessments
Performance tests
Management and leadership profiles
360 and 180 assessments by supervisors, peers, subordinates

Personality classification models
Personal style
Self assessment
Assessment by others
Myers-Briggs
Counselor assessment

Assessment techniques
Interview
Test
Group interaction
Objective/subjective data and evaluations
Personal feelings/opinions
Family/friend input
Feedback data
External evaluations

Mind, body, spirit
Self-assessment of needs, strengths, weaknesses
Outside counseling
Spiritual advice
Short-term contingency plan
Long-term career plans
Planned job change
Reinvention of self
Generalist vs. specialist
Responsibility for own professional development
Ongoing education/personal growth

Professional Responsibility Task 4: continued

Group/personal dynamics
Participant exercises
Participant evaluation
Team building methods/models
Feedback

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 5:
Engage in professional networking

Core Professional Responsibility Knowledge for Task 5

Knowledge of existing professional organizations/networks
MGMA, ACMPE and other membership databases
Industry/professional contacts
Internet, e-mail communications
Conferences

Coaching/mentoring philosophies
Commitment vs. over-commitment
Do's and don'ts
Work/life balance
Corporate politics
Values

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 6:
Advance the profession by contributing to the body of knowledge

Core Professional Responsibility Knowledge for Task 6

Body of knowledge and relationship to practice management
Importance of a body of knowledge for professional legitimacy
Contents of the ACMPE Body of Knowledge
Application of knowledge and skills to medical practice management
Importance of sharing knowledge and information with the field

Perspectives on ambulatory medicine
History
Trends
Specialties
Rural vs. urban
Small vs. large
Integrated systems

Perspectives on practice management
Roles of clinical staff
Patient focus
Clinical practice overview
Role of administration/support
Policies/procedures
Emerging fields for practice administration

Perspectives on community health care organizations
Relation to hospitals/clinics/home health agencies
Relation to other medical groups, solo practices
Relation to human service agencies (public, private)

Perspectives on health care issues
Uninsured/charity care
HIV, TB, hepatitis
Diversity, cultural preferences
Access to care
Cost sharing
Community collaboration

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas
of the Body of Knowledge for Medical Practice Management.

Professional Responsibility Task 7:
Develop effective interpersonal skills.

Core Professional Responsibility Knowledge for Task 7

Giving/receiving feedback
Informal/formal dialogue
Surveys
Facilitated group discussion

Communication techniques
Verbal
Written
Electronic
Body language

Employee needs
Informal conversations
Performance reviews
Exit interviews

Patient needs
Complaints
Informal discussions
Focus groups
Surveys

Board/administration needs
Informal discussions
Performance reviews
Surveys
Policies/procedures
Relationship to leaders

Physician needs
Physician/administrator differences
Common values/mission
One-on-one interactions
Decision-making styles
Time sensitivity
Focus on patient

Return to *Professional Responsibility Task Table*.

Find *books and other products on Professional Responsibility*.

Find *educational resources* on Professional Responsibility.

Take an objective *knowledge assessment* of what you know in this and other areas of the Body of Knowledge for Medical Practice Management.

Click to find out more information on *ACMPE certification*.

Glossary of Terms

- **401(k), 403(b)** — *Savings investment plans that employers offer to employees that contain tax-savings. 401(k) plans are offered by for-profit companies and 403(b) plans are offered through not-for-profit companies.*

- **ADA** — *Americans with Disabilities Act*

- **BARS** — *Behaviorally anchored rating scale*

- **C vs. S corporation:** *Conventional C corporation status versus a Subchapter corporation status with the IRS for tax purposes*

- **CCI** — *Correct Coding Initiative*

- **Competencies:** *General statements of what candidates must know and be able to do to be considered capable; clusters of key skills, knowledge that makes a performer successful at a given job. Competencies tell you what organizations value and indicate areas where standards should be set. From a certification standpoint, competencies can be regarded as the logical building blocks upon which assessments of professional development are based. There are five General Competencies for Medical Practice Executives identified in the Body of Knowledge: Professionalism, Leadership, Communication Skills, Organizational and Analytical Skills and Technical/Professional Knowledge and Skills.*

- **CMS** — *Centers for Medicare and Medicaid Services, formerly known as the Health Care Financing Administration (HCFA)*

- **COBRA** — *Consolidated Omnibus Budget Reconciliation Act*

- **CPT and ICD-9** — *Current Procedural Terminology and International Classification of Diseases, 9th Edition*

- **CPA** — *certified public accountant*

- **EEO** — *equal employment opportunity*

- **ERISA** — *Employee Retirement Income Security Act of 1974*

- **E & M** — *evaluation and management (levels of service)*

- **FLSA** — *Fair Labor Standards Act*

- **FMLA** — *Family Medical Leave Act*

- **HEDIS** — *Health Plan Employer Data Information Set*

- **HIPAA** — *Health Insurance Portability and Accountability Act*

Glossary of Terms *continued*

- **HIV/HVC —** *Human immunodeficiency virus/hepatitis virus C*

- **IDS —** *integrated delivery system*

- **IPA —** *independent practice association/arrangement*

- **IRS —** *Internal Revenue Service*

- **IS —** *information services (ancillary service applications)*

- **IT —** *information technology*

- **JCAHO —** *Joint Commission on Accreditation of Healthcare Organizations*

- **Knowledge:** *The information people draw on to perform the task within the domain*

- **LLC —** *limited liability corporation*

- **Medical practice executive:** *A professional who has acquired knowledge and skill through a combination of experience and education and provides leadership to manage health care delivery using the five competencies of the Body of Knowledge for Medical Practice Management.*

- **MIS —** *management information system*

- **MSO —** *management service organization*

- **NCQA —** *National Committee for Quality Assurance*

- **NLRA —** *National Labor Relations Act*

- **OIG —** *Office of Inspector General*

- **OSHA —** *Occupational Safety and Health Administraion*

- **PC —** *personal computer*

- **Performance domain:** *The areas of skills, tasks and knowledge that make up the Technical/Professional Knowledge and Skills competency of the Body of Knowledge for Medical Practice Management. There are eight performance domains identified in this competency: Financial Management, Human Resource Management, Planning and Marketing, Information Management, Risk Management, Governance and Organizational Dynamics, Business and Clinical Operations, and Professional Responsibility.*

- **PERT chart —** *Program valuation and review techniques*

- **PHO —** *physician hospital organization*

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Glossary of Terms continued

- **PITA factor—** *acronym for "Pain In The Ass" factor donnoting people/things/situations that are very difficult to handle and may not be worth the effort of handling*

- **PPMC —** *physician practice management company*

- **PPO —** *preferred provider organization*

- **RBRVS —** *resource-based relative value scale*

- **RFI —** *request for information*

- **RFP —** *request for proposal*

- **Skills:** *The intellectual, emotional and physical behaviors required to perform the tasks within a domain.*

- **Task Statement:** *A task is an activity performed within the performance domain. Each performance domain consists of a series of skills, tasks and knowledge . Task statements are a specifications used in the ACMPE certification examination process.*

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