Module 1: Introduction to Medical Office Simulation Software (MOSS) 2.0

Overview

Module 1 introduces the Computer Competency Exercises that demonstrate managing various tasks typical of a physician’s front office, such as the ones you have learned in your book, Administrative Medical Assisting, 6th Edition. You will be able to apply the skills you have learned to practice management software using Medical Office Simulation Software (MOSS) version 2.0 (single-user).

**NOTE: It is important to complete the exercises in the order presented, starting with Module 1 through Module 9. This will allow proper input of data and optimal functionality of the software.**

These Computer Competency exercises are used within a simulated medical practice called Douglasville Medicine Associates. Douglasville Medicine Associates is a large group of physicians with satellite offices. You will be working with the family practice physicians L.D. Heath, MD, and D.J. Schwartz, MD and their patients at the office on 5076 Brand Blvd., Suite 401, in Douglasville, NY.

There are insurance companies in the simulation that provide benefits for covered patients. The insurance plans used in this simulation include the following:

- FlexiHealth, a PPO (Participating/Preferred Provider Organization), for which Dr. Heath is an in-network provider and Dr. Schwartz is an out-of-network provider.
- Signal HMO, a Health Maintenance Organization plan for which both physicians are participating providers.
- Medicare, administered locally by Statewide Corporation. Dr. Heath is a PAR (participating Medicare Provider) and Dr. Schwartz is a NON-PAR physician for Medicare.
- Century SeniorGap, a Medigap policy that supplements patients with original Medicare.
- Medicaid, used as a secondary plan to Medicare in the simulations found in this book.
- ConsumerONE HRA, a Health Reimbursement Arrangement (HRA) plan. Both Drs. Heath and Schwartz participate with this plan.

1.1 Computer Competency

**Navigate Medical Office Simulation Software (MOSS)**

**Objective:** The reader will be oriented to the menus and navigation features of Medical Office Simulation Software (MOSS).
Step 1: MOSS features a main screen with a *Main Menu* consisting of buttons that can be clicked to access specific areas. Refer to Figure 1-1.

Step 2: In addition to the *Main Menu* at the center of the screen, there are alternate ways to access areas of the software. Along the top left, just below the software title bar, are the pull-down menus. Click on *File* and note the available menu selections. Without clicking, move the mouse pointer to the right until the next pull-down menu displays. Many of these selections are the same as the *Main Menu* choices at the center of the screen. Others, such as *Lists*, offer shortcuts that save time getting to certain functions of the software. See Figure 1-2.
Step 3: Another useful tool for navigating the software is the icon toolbar. The toolbar consists of small pictures that serve as buttons to quickly access areas of the software. Place the mouse pointer over the first icon in the toolbar, without clicking. A caption will appear after a few seconds indicating what the button is used to access. Move your mouse pointer over each icon to view the captions for all of the icons in the toolbar (refer back to Figure 1-2).

Step 4: On the right side of the main screen are utility icons. The first opens a calculator when clicked, handy for financial tasks. The middle icon has a caption that reads *Restore Loaded Forms*. This will maximize forms or windows that are not immediately visible. If you can’t find a window you were working with, click this icon to restore any minimized windows for viewing. The last icon labeled *Exit* will close Delmar’s Medical Office Simulation Software and return you to the Windows desktop.

Step 5: On the *Main Menu*, click the *Patient Registration* button. This displays a patient selection dialog box. This dialog box is used extensively throughout the software to select patient accounts for various tasks. The option buttons along the top allow searching for a patient either by name, social security number or account number. When the desired patient is shown on the list, double-click on the patient’s last name to make the selection. You can also click once in the space to the left of the patient name, and then click on the *Select* command button at the bottom. Try this a few times, using the *Close* button at the bottom right of any screen that opens. See Figure 1-3.
Step 6: Some of the patient selection dialog boxes have an Add button along the bottom. Whenever the add button is available, new data can be entered in the software database. The type of data that can be entered with the Add button can differ depending on what area of the software you are working in. In the Patient Registration area, the Add command button will allow input of demographic and insurance data for new patients.

Step 7: You should still be at the patient selection dialog box for Patient Registration. If not, click on Patient Registration from the Main Menu. Using one of the selection methods you just learned (Step 5), select Eugene Sykes from the patient list. The Patient Registration dialog box for this patient should display. See Figure 1-4.
Step 8: Notice the tabs along the top of the window, labeled Patient Information, Primary Insurance, HIPAA, etc. By clicking on these tabs, more information regarding patient Sykes can be viewed. Practice clicking on each tab and observe the information contained on each screen. Do not click on the save or delete buttons as you explore these tabs.

Step 9: Click on the tab labeled Primary Insurance. Click on the search icon to the right of Field 1, Insurance Plan (it looks like a magnifying glass). See Figure 1-5.

This will display the insurance plans in the software database. Notice the Select and Add command buttons along the bottom. There is an Edit button in this area to make corrections to the data if needed. Click on the Close button to exit the insurance selection dialog box.

Step 10: You are now ready to close the Patient Registration Screen. Click on the Close button. If a prompt appears that reads “Do you want to Save changes”, click on the No button to exit. If the Patient Selection dialog box is open, you may close it. This will return you to the Main Menu.
Help Captions and Feedback Features

Delmar’s Medical Office Simulation Software has features a help file that offers two options: feedback mode and balloon help captions. **Feedback mode** will alert the user when essential fields have not been completed before allowing data to be saved. When an attempt is made to save a screen that is not complete, a small window will display the fields that require data input, as shown in Figure 1-6.

**Balloon help** offers explanations, clarification or reminders for certain fields. To utilize this feature, click in a field, and look in the lower left task bar for an explanation of the selected field. By holding the mouse pointer over select field captions, a pop-up bubble caption appears that also explains the field.

These features can be selected by going to the **Help** tab of the **File Maintenance** area. See Figure 1-7. Clicking in the box in front of the desired feature will select it by placing a checkmark in the box. Be sure to close the software, and then reopen it in order for the selected features to activate.
1.2 Computer Competency

Update Four Patient Records Following Telephone Procedures Using MOSS

Description of Simulation: You are assigned to the front desk on October 19, 2009. In addition to greeting patients as they arrive for appointments, you are responsible for answering the telephone, screening calls, taking messages, and routing calls to appropriate staff members when needed.

Patient 1: James, David

Step 1: Open MOSS and logon with your student identification.

Step 2: A telephone message is routed to you from the office manager (initials “cc”). The office manager took the call, but would like you to follow-up with the action needed. Refer to Figure 1-8 for message details.
### Step 3: Review the message, and answer the following questions:

A. Who was the call from?

B. At what time and date was the message taken?

C. Who is the patient?

D. What action needs to be taken?

E. Which phone number will you use to call Emma back?

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### Step 4: Using the Main Menu, go to the Patient Registration area and open the record for patient David James.

### Step 5: In preparation for calling Emma, use MOSS to review the information currently on record for this patient. Be sure to check the data under the Patient Information tab, the Parent/Spouse/Other tab, and the Primary and Secondary Insurance tab. This will familiarize you with the account before speaking to the patient’s mother. See Figure 1-9.
Step 6: Using a classmate for role-play, or practicing out loud on your own, simulate calling Emma O’Connor on the telephone and requesting the information needed.

Here is an example of the dialogue:

Medical Assistant: Good Morning, I am calling for Emma O’Connor.

Emma: This is she. May I help you?

Medical Assistant: Yes, thank you. This is [your name] from Dr. Heath’s Office. I received a message that you have insurance information that needs to be updated for your son, David James.

Emma: Yes, I have a new employer and my coverage has changed. David is still insured through my plan, but it is a different company.

Medical Assistant: I would be happy to update that information for you, Ms. O’Connor. Please give me the name of your new employer, the address and phone number.

(Hint: It is recommended that you write the information down, and input it later to MOSS, or, in an actual office environment, you may input the information to the software as it is given to you. Check your office policy and utilize the method that is most practical).

Emma: My new employer is Meridian, Inc. The address is 8890 Midway Blvd, Douglasville, NY, 01234. The phone number is (123)547-1321.

Medical Assistant: Thank you. What is the name of your new insurance plan?

Emma: I now have FlexiHealth PPO. I believe Dr. Heath accepts this plan, is that right?
Medical Assistant: Yes, Dr. Heath is a participating doctor with FlexiHealth PPO. Can you provide the ID number, policy and group number as they appear on your insurance card?

Emma: Yes, the ID number is 991611389-89B. There is no policy number. The group number is MIG-135

Medical Assistant: Do you know if there is a co-payment for office visits? It might say on the front of the card.

Emma: Yes, there is a $20.00 co-payment for office visits.

Medical Assistant: Are there any other updates I need to make to our records, such as phone numbers, or a home address?

Emma: No, nothing else has changed. But, his father’s insurance is no longer a secondary insurance. He lost his job and doesn’t have that coverage anymore.

Medical Assistant: Thank you for providing this information; I will make sure David’s record is updated. As a reminder, the next time he is in the office to visit the doctor, please bring the new insurance card so we can copy it.

Emma: Thank you very much, I will.

Medical Assistant: Have a good day. Good-bye.

Emma: Have a good day as well, good-bye.

**Step 7:** Using the information you have gathered from this conversation with Emma O’Connor, update the patient’s record using MOSS. You should have David James’ Patient Registration screen open. If not, open it now (Hint: From the Main Menu, click Patient Registration, and then open the record for David James from the patient list).

**Step 8:** Click on the Spouse/Parent/Other tab and then click on the Employer button for field 1, which pertains to Emma O’Connor’s information. Update the employer information in the window that opens. Use Figure 1-10 for guidance on making these updates.
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Step 9: Click on the Close button—the employer information will be updated automatically. Next, click on the Save button to update the record.

Step 10: You will now update the insurance information. Click on the Primary Insurance tab. In field 1, Insurance Plan, click on the magnifying glass icon to drop down the list of insurance plans. Select FlexiHealth PPO, as shown in Figure 1-11.

Step 11: Update the information for the ID number (Field 7), Group number (Field 9), employer name (Field 10), and the co-payment amount in Field 11 ($20.00). Click in each field indicated above, and then delete or backspace the current information and input the new information as needed. Check you work with Figure 1-12 and click Save to update the record.
Step 12: Next, you will update the secondary insurance information. Click on the Secondary Insurance tab. In field 1, Insurance Plan, click on the magnifying glass icon to drop down the list of insurance plans. Select Self Pay, and then delete all the information in the fields pertaining to the father. Check your work with Figure 1-13, and then click on Save.
Step 13: On the message form in Figure 1-8, complete the documentation to finish your work. In the area under DOCTOR-STAFF RESPONSE, in the space following the note already there, document that you have updated the new employer and insurance information in MOSS.

Also fill in the Follow-Up Completed Date/Time (HINT: See bottom of message form), and write in the date: 10/19/09.

Provide your initials in the Response by box to indicate you are the staff member that took care of this message.

Step 14: In MOSS, close all open windows and return to the Main Menu.

Patient 2: Manaly, Richard

Step 1: Open MOSS and logon with your student identification.

Step 2: The phone rings at 10:30 am on October 19, 2009 and you answer it. Practice the following dialogue with a classmate, or out loud on your own, and write down the details of the message on a blank form.

Medical Assistant: Good Morning, Douglasville Medicine Associates, [your name], how may I help you?
Caller: Yes, I have some information for Dr. Schwartz.
Medical Assistant: I would be happy to take a message for Dr. Schwartz. With whom am I speaking?
Caller: This is Richard Manaly.
Medical Assistant: Are you a patient of this practice, Mr. Manaly?
Mr. Manaly: Yes, I am. I have moved and need to give the doctor my new address.
Medical Assistant: I can take care of that for you, Mr. Manaly. Please give me the new address.
Mr. Manaly: The address is 13069 Pebble Trail, Douglasville, NY 01234.
Medical Assistant: Has your phone number changed as well, Mr. Manaly?
Mr. Manaly: Yes, but only at home, my work number is the same. The new home number is: (123)456-8791.
Medical Assistant: Thank you. Is there any other information that needs to be changed on your record today?
Mr. Manaly: No, that was all.
Medical Assistant: Very well, I will update your record. Thank you for calling to update your address, Mr. Manaly. Is there anything else I can assist you with today?
Mr. Manaly:   No, thank you.

Medical Assistant:   Have a good day. Good-bye.

Mr. Manaly:   Good-bye.

**Step 3:** Refer to the message shown in Figure 1-14. Review the information on the message with the details you wrote down. You are now ready to update the patient’s record.

![Figure 1-14](image)

**Step 4:** Use the Main Menu to access the Patient Registration area and open the record for patient Richard Manaly.

**Step 5:** Click on the Patient Information tab and click inside the fields for Address (Field 8), Zip Code (Field 11), and Home Phone (Field 12) and update the information by deleting or backspacing, and inputting the new data. Use Figure 1-15 to check your work, and then save the information.
Step 6: Close all open windows in Patient Registration and return to the Main Menu.

Step 7: Using Figure 1-14, write the action you took in the area under DOCTOR – STAFF RESPONSE, including the Follow-Up Date and your initials in the Response by box.

Patient 3: Ybarra, Elane

Step 1: Open Delmar’s Medical Office Simulation Software and logon with your student identification.

Step 2: A telephone message is routed to you from the office manager (initials “cc”). The office manager took the call, but would like you to follow-up with the action needed. Refer to 1-16 for message details.
Step 3: Answer the following questions about the message:

A. Who was the call from?
B. At what time and date was the message taken?
C. Who is the patient?
D. What action needs to be taken?
E. Which phone number will you use to call Elane back?

Step 4: Using the Main Menu, go to the Patient Registration area and open the record for patient Elane Ybarra.

Step 5: In preparation for calling Elane, use MOSS to review the information currently on record for this patient. Be sure to check the data under the Patient Information tab, the Parent/Spouse/Other tab, and the Primary and Secondary Insurance tab. This will familiarize you with the account before speaking to the patient.

Step 6: Using a classmate for role-play, or practicing out loud on your own, simulate calling Elane Ybarra on the telephone and requesting the information needed. Here is an example of the dialogue:

Medical Assistant: Good Morning, I am calling for Elane Ybarra.
Elane: This is Elane.
Medical Assistant: Good morning, this is [your name] from Dr. Schwartz’s Office. I received a message that you have information that needs to be updated on your patient record.

Elane: Yes, thank you for calling. Recently, my divorce from my husband, Ross, became final. I am not covered under his health plan any longer. I am concerned about what happens now when I need medical care.

Medical Assistant: Will you be covered under a different health plan in the future? (Hint: It is recommended that you write down the forthcoming information, and input it later to MOSS, or, in an actual office environment, you may input the information to the software as it is given to you. Check your office policy and utilize the method that is most practical).

Elane: My new employer has a waiting period of three months before I become eligible for benefits. I still have two months to go, but I think I may need to come see the doctor before then. I’m having a problem that probably can’t wait another couple of months.

Medical Assistant: If you need to visit Dr. Schwartz before your insurance benefits are effective, I can indicate that you are paying for your own care. When your insurance takes effect in the future, you can bring in your insurance card and we can update your record at that time.

Elane: Ok. But can I make small payments if my medical fees are more than I can afford to pay all at once?

Medical Assistant: I can find out if that is possible by consulting with my office manager. May I call you back later today with that information?

Elane: Yes, that would be fine.

Medical Assistant: Is there a number I can reach you at later today?

Elane: Yes, I will be at (123)466-8490 until 5:00 pm today.

Medical Assistant: Very well, I will call you back. To review, I am removing Ross Ybarra from your record and updating it to show that you are the responsible party for your medical expenses. I will be removing the current medical insurance and changing it to self-pay until you are eligible for insurance in the future. Are there any other updates I need to make to our records, such as phone numbers, or a home address?

Elane: Yes, I have an apartment now, so my address has changed. The new address is: 8766 Slate Drive, Apartment 101; Douglasville, NY 01234. The new phone number is: (123)987-4602

Medical Assistant: Thank you. You mentioned that you have a new employer. May I have that information to update your records?

Elane: Yes, my employer now is: Jenkins Veterinary Hospital; 12588 Industry Way; Douglasville, NY 01233. My work number is: (123)466-8490
Medical Assistant: Thank you, Ms. Ybarra. Is there any other information that I can update for you today? Is there any change with your name?
Elane: No, I will continue to use Ybarra.

Medical Assistant: Very well. If you have any other questions, please call us back. I will call you later about the payment question you have. Would you like to make your appointment to see Dr. Schwartz now?

Elane: Yes, thank you!

Medical Assistant: Please hold while I transfer you to the appointment desk. Thank you.

**Step 7:** Using the information you have gathered from this conversation with Elane Ybarra, update the patient’s record using MOSS. You should have patient Ybarra’s Patient Registration screen open. If not, open it now (Hint: From the Main Menu, click Patient Registration, and then open the record for Elane Ybarra from the patient list).

**Step 8:** Click on the Patient Information tab and update the home address and telephone number the patient provided to you. (Hint: Fields 8, 11, and 12 will need to be updated).

**Step 9:** Continuing on the same screen, update Elane Ybarra’s new work phone number and employer information. (Hint: Fields 13, 15, 16, and 19 will need to be updated).

**Step 10:** Continuing on the same screen, update Elane Ybarra’s new work phone number and employer information. (Hint: Fields 13, 15, 16, and 19 will need to be updated). Change her marital status to Single.

Also change Field 21 to Self by clicking in the box to indicate the patient is now the responsible party for her medical expenses. Click on the Save button, and then use Figure 1-17 to check your work.
Step 11: You will now update the spouse information. Click on the Spouse/Parent/Other tab. In field 2, change the guarantor to No, and then delete all information for Ross Ybarra, as shown in Figure 1-18. (Hint: Don’t forget to delete the address and employer information for Ross Ybarra).
Step 12: You will now update the insurance information. Click on the Primary Insurance tab. In field 1, Insurance Plan, click on the magnifying glass icon to drop down the list of insurance plans. Select Self Pay, as shown in Figure 1-19.
Step 13: Finish updating the information in the Primary Insurance tab by clicking on Self in Field 2 (all of the information below that on Ross Ybarra will come off). Be sure that Fields 12, 13, and 14 are checked No. The record is now ready for the patient’s new insurance information when she becomes eligible in the future. Check your work with Figure 1-20, and click Save.
Step 14: On the message form in Figure 1-16, document your work in the area under DOCTOR-STAFF RESPONSE. Document that you have updated the patient, employer and insurance information in MOSS.

Also fill in the Follow-Up Completed Box (HINT: See bottom of message form), and write in the date: 10/19/09.

Provide your initials in the Response by box to indicate you are the staff member that took care of this message.

Step 15: Close all open windows and return to the Main Menu.

Patient 4: Stearn, Wilma

Step 1: Open MOSS and logon with your student identification.

Step 2: The phone rings at 9:30 am and you answer it. Practice the following dialogue with a classmate, or out loud on your own, and write down the details of the message.

Medical Assistant: Good Morning, Douglasville Medicine Associates, [your name], how may I help you?

Caller: Yes, this is Bernard Stearn. My aunt is accompanying my mother to her appointment this morning, since I can’t come. I’d like to give you my mother’s new mailing address. She now lives with me, and her previous address is no longer good.
Medical Assistant: I can take care of that, Mr. Stearn. What is your mother’s name?
Mr. Stearn: Please, call me Bernie. My mother’s name is Wilma Ann Stearn.
Medical Assistant: Thank you, Bernie. What is the new address for your mother?
Bernie: The new address is 11320 Marble Way, Douglasville, NY 01234.
Medical Assistant: Has the phone number changed as well, Bernie?
Bernie: No, I put in a private line for her and she is using the same phone number as before.
Medical Assistant: Let me verify the phone number we have on her record. It is (123)457-6215 – is that correct?
Bernie: Actually, her phone number is (123)457-6216.
Medical Assistant: Thank you; I will correct the phone number on our record. Is there anything else I can assist you with today?
Bernie: No, thank you, that was all. Can the doctor call me later to discuss any tests or anything I need to know after her visit today?
Medical Assistant: I will make a note to let Dr. Heath know you would like to know about her visit and any details.
Bernie: Ok, thanks. The doctor can call my cell phone at (123)528-9895. I always have it on.
Medical Assistant: That number is (123)528-9895, correct?
Bernie: Yes, thank you.
Medical Assistant: Thank you, have a good day.
Bernie: Good-bye.

Step 3: Refer to the message shown in Figure 1-21. Review the information on the message with the details you wrote down. You are now ready to update the patient’s record.
Step 4: Using the Main Menu, go to the Patient Registration area and open the record for patient Wilma Stearn.

Step 5: Click on the Patient Information tab and click inside the fields for Address (Field 8) and Home Phone (Field 12). Update the information by deleting or backspacing, and inputting the new data. Check your work with Figure 1-22, and then save your work.

Step 6: In MOSS, close all open windows and return to the Main Menu.
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**Step 7:** Using Figure 1-21, write the action you took in the area under DOCTOR – STAFF RESPONSE, including the *Follow-Up Date* and your initials in the *Response by* box. Include Bernie’s cell phone number and a note for Dr. Heath to call him regarding his mother’s visit.

**Step 8:** In MOSS, close all open windows and return to the *Main Menu*.

**Module 1 is complete.**