

THE REGISTERED APPRENTICESHIP OCCUPATIONS AND STANDARDS CENTER OF EXCELLENCE (AOSC)

Medical Secretary National Occupational Framework

ONET-SOC Code: 43-6013.00

RAPIDS Code: 0751

This project has been funded, either wholly or in part, with federal funds from the Department of Labor, Employment and Training Administration under Cooperative Grant Number AP-36653-21-75-A-11. The contents of this publication do not necessarily reflect the views or policies of the Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement of the same by the US Government.





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Acknowledgments

We would like to thank several people who have contributed to the development and vetting of this National Occupational Framework. We would especially like to thank Diane Jones for her research, support, and contributions to the development of the framework. Additionally, we had terrific experts lend their time, review, and support to the framework. They include Dorie Kenitzer of Montana Health Network; Anita Ricker of Walters State Community College; Karen Garcia of Arbor Family Medicine; Heather Keller of MedCerts; Laura Dailey of Lifepoint Health; Sarah Beckle of St. Joseph County ISD; Chris Heuston of Front Range Community College; Meena Murthy of St. Peter's University Hospital, New Jersey; and Donald Balasa of the American Association of Medical Assistants. We also want to thank Shruti Nayak, Andrew Campbell, Bhavani Arabandi, and Erikah Garnett for their thoughtful creation and review of this framework. Finally, we want to thank our editor Liza Hagerman.

Introduction to Using This Document

Under the Registered Apprenticeship Technical Assistance Centers of Excellence award, the Urban Institute leads the Occupations and Standards work. One of the main objectives of Urban's project is to create high-quality, well-researched, consensus-based work process schedules that are nonproprietary and widely available. This document is a product of that work and contains three sections: the occupational overview, the work process schedule, and the related technical instruction.

The **occupational overview** is a general introduction, including alternative job titles, any prerequisites, and, if applicable, the total number of hours needed to complete a time-based or hybrid program.

The **work process schedule** outlines the major job functions, competencies, and/or hours an apprentice completes in a registered apprenticeship program. It outlines what apprentices are expected to learn on the job with the support of a mentor or journeyworker (a worker mastering the competencies of an occupation in a particular industry), including both core competencies and those deemed optional by experts in the field. The work process schedule is the foundational document guiding a program.

Urban works with numerous experts to ensure the content is thoroughly researched and vetted to reflect the expectations of industry, educators, labor unions, employers, and others involved in apprenticeship for this occupation. Sponsors and employers can use the work process schedule as their program standards with assurances it has been approved by experts in the field.

The **related technical instruction** presents considerations for the coursework that apprentices will undertake to supplement on-the-job learning. It is intended to serve as a reference to sponsors exploring their options for the accompanying classroom, virtual, or hybrid training.

How to Use the Work Process Schedule

Sponsors can adapt the work process schedule to accommodate their needs for competency- or time-based or hybrid programs. In a **competency-based** apprenticeship, sponsors assess apprentices' progress across core and optional competencies listed in the work process schedule. In a **time-based** apprenticeship, apprentices complete a predetermined number of hours across major job functions and the program overall. In a **hybrid** apprenticeship, sponsors monitor apprentices' hours spent on major job functions and assess their proficiency across competencies.

Each program type has a different method of assessment:

- **For a competency-based program**, apprentices engage in activities and make progress toward proficiency in the identified competencies. Sponsors overseeing apprentices' work assess their mastery of the outlined competencies using the following rating scale:

- 4—Competent/proficient (able to perform all elements of the task successfully and independently)
- 3—Satisfactory performance (able to perform elements of the task with minimal assistance)
- 2—Completed the task with significant assistance
- 1—Unsuccessfully attempted the task
- 0—No exposure (note the reason—absence, skill isn't covered, etc.)

The competencies may be completed in any order. Apprentices must perform at a level 4 or 3 in all competencies listed as “core” to complete the apprenticeship program successfully.

- **For a time-based program**, sponsors monitor apprentices' completion of hours in training across major job functions. The total number of hours recommended for this occupation is listed in the occupational overview and is based on guidance from the US Department of Labor. Generally, apprentices must have at least 2,000 hours overall for on-the-job learning, but occupations of greater complexity may require more hours. Sponsors will provide apprentices with supervised work experience and allocate the total number of hours across the major job functions to adequately train their apprentices.
- **The hybrid approach** blends both competency- and time-based strategies. Sponsors measure apprentices' skills acquisition through a combination of completing the minimum number of hours of on-the-job learning successfully demonstrating identified competencies. Sponsors will assess apprentices' proficiencies as described for competency-based programs with a rating scale of 0–4 for every core competency. Generally, apprentices have at least 2,000 hours overall for on-the-job learning, but occupations of greater complexity may require more hours. Sponsors will document apprentices' completion within a minimum and maximum range of hours assigned for each major job function.

Medical Secretary Occupational Overview

Occupational Purpose and Context

A medical secretary is a staff member in health care facilities like hospitals and doctors' offices who performs administrative and supportive functions to ensure the success of the provider team in caring for patients. In addition to having administrative skills, medical secretaries should have a basic knowledge of medical terminology and be familiar with the core medical procedures and business practices of their office or care facility. Medical secretaries are expected to manage the daily operations of a medical facility, check patients in, verify patient insurance, and provide quality customer service.

Potential Job Titles

Medical office assistant, medical office specialist, medical secretary, physician office specialist, secretary, medical records specialist

Apprenticeship Prerequisites

High school diploma or equivalence

Recommended Length of Apprenticeship (Time/Hybrid Programs Only)

2,000 hours

Work Process Schedule

Medical Secretary

ONET Code: 43-6013.00

RAPIDS Code: 0751

Instructions for Use:

Competency-based programs: In the “performance level achieved” column of the work process schedule (see examples starting on the next page), assess apprentices’ performances on each competency with the scale below. No monitoring of hours is required for this approach. See “Guidelines for Competency-Based, Hybrid and Time-Based Apprenticeship Training Approaches,” US Department of Labor, Employment and Training Administration, Office of Apprenticeship, October 20, 2015,

<https://www.apprenticeship.gov/sites/default/files/bulletins/Cir2016-01.pdf>.

- 4—Competent/proficient (able to perform all elements of the task successfully and independently)
- 3—Satisfactory performance (able to perform elements of the task with minimal assistance)
- 2—Completed the task with significant assistance
- 1—Unsuccessfully attempted the task
- 0—No exposure (note the reason—absence, skill isn’t covered, etc.)

Time-based programs: In the “hours” row, specify the number of hours apprentices will fulfill for each job function. No assessment of competencies is required for this approach.

Hybrid programs: In the “performance level achieved” column, assess apprentices’ performances on each competency using the 0–4 scale above. In the “hours” row, identify a range of hours apprentices should spend working on each major job function.

Job Function 1: Supports patient access to medical care by relaying information between providers and patients, answering questions about services, and coordinating appointments

Hours (time-based and hybrid programs only):

Competencies	Core or optional	Performance level achieved (0–4) (competency-based and hybrid programs only)
A. Greets callers and in-person visitors warmly and provides courteous service	Core	
B. Uses sound judgment when dealing with highly sensitive medical information	Core	
C. Answers patient or provider questions thoroughly and with patience and clarifies misunderstandings	Core	
D. Connects patients with necessary resources, such as interpreters or translators, when necessary	Core	
E. Serves as a primary point of contact for the patient and clearly communicates patient needs to the provider team	Core	
F. Relays information about the provider’s accepted insurance plans and directs patients to appropriate resources for questions about cost of care	Core	
G. Answers questions for patients or caregivers regarding physician-ordered referrals for diagnostic appointments, surgeries, or medical consultations	Core	
H. Demonstrates empathy and compassion in difficult situations	Core	
I. Receives, documents, and properly follows through on referrals	Core	
J. Coordinates follow-up between patients and providers on lab results, diagnoses, and appointments	Optional	

Job Function 2: Provides internal support to care provider team

Hours (time-based and hybrid programs only):

Competencies	Core or optional	Performance level achieved (0–4) (competency-based and hybrid programs only)
A. Collects completed patient charts (electronic or hard copy) for office visits and prepares staff for appointments	Core	

by organizing relevant patient health information, such as reason for visit (including chief complaint), allergies, surgical history, family history, health problems, and immunization records		
B. Relays information between members of care provider team	Core	
C. Provides administrative support to physicians, other licensed providers, nurses, and other medical professionals by following directives and seeking clarification when necessary	Core	
D. Ensures licensed provider productivity by maintaining calendars, professional meetings, conferences, teleconferences, and travel (may be important for smaller offices)	Core	
E. Updates demographic and insurance information for patients thoroughly and accurately	Core	
F. Communicates and completes requests between medical offices and staff (faxing or transmitting patient medical records or other information as requested)	Core	
G. Tracks and directs pipeline of drug refill requests to appropriate medical staff for review and approval. Follows up on prescription refills for patients only as directed by the overseeing licensed independent provider and as permitted by state law	Optional	

Job Function 3: Supports office management including billing, data management, and overseeing supplies		
Hours (time-based and hybrid programs only):		
Competencies	Core or optional	Performance level achieved (0-4) (competency-based and hybrid programs only)
A. Oversees office supplies inventory by checking stock, anticipating needs, placing and expediting orders, and verifying receipts	Core	
B. Maintains and controls medical inventory, checking for expired medical supplies	Core	
C. Coordinates and processes incoming and outgoing mail	Core	
D. Works with care provider team to complete and submit insurance and other claims forms	Core	

E. Adopts appropriate acquisition and retrieval systems for medical data	Core	
F. Maintains current safety data sheets (SDSs) for items in the delivery setting that contain hazardous substances and ensures that SDSs are readily and quickly accessible for staff	Core	
G. Helps coordinate with appropriate departments to support patient and insurance billing	Optional	
H. Keeps office equipment operating by following operating instructions, troubleshooting breakdowns, maintaining supplies, performing preventive maintenance, and calling for repairs	Optional	

Job Function 4: Applies knowledge of technology, databases, and other software

Hours (time-based and hybrid programs only):

Competencies	Core or optional	Performance level achieved (0–4) (competency-based and hybrid programs only)
A. Possesses basic knowledge of computers and strong data entry skills to capture and process information		
B. Enters information taken from admission forms into the computer system on a timely basis		
C. Uses medical software systems, such as Epic, to manage medical records		
D. Demonstrates proficiency in Word, Excel, and other office processing software as required		
E. Understands and follows proper procedures to create and maintain medical records, including Electronic Health Record (EHR) documentation		
F. With supervisor guidance, understands and follows data management laws that protect the confidentiality of patient information, such as the Health Insurance Portability and Accountability Act (HIPAA) and the Genetic Information Nondiscrimination Act (GINA)		
G. Trains and assists staff with computer usage (applicable to small offices)		
H. Contributes to and cooperates with the implementation of system improvements		

Job Function 5: Demonstrates professional and ethical skills and practices

Hours (time-based and hybrid programs only):

Competencies	Core or optional	Performance level achieved (0–4) (competency-based and hybrid programs only)
A. Demonstrates effective time management skills to complete assigned tasks by the deadline	Core	
B. With guidance from supervisors, identifies challenges in professional and ethical attributes and practices, and develops strategies for addressing them as needed	Core	
C. Uses professional judgement to prioritize tasks and patient appointments based on severity of patient needs	Core	
D. Demonstrates knowledge of medical terminology and abbreviations, and uses this knowledge to effectively communicate between patients and care provider team	Core	
E. Demonstrates conflict resolution skills by identifying the appropriate way to handle different situations	Core	
F. Updates job knowledge by participating in educational and training opportunities	Core	
G. Engages in continued training on personal biases and applies these insights to ensure professional and impartial conduct to avoid disparities in equitable health care	Core	
H. Understands and abides by requirements of the Occupational Health and Safety Administration (OSHA)	Core	
I. Understands and abides by state law regarding which medically licensed staff members are permitted to inform patients (or their representatives) of unfavorable test results	Core	
J. Supports and protects the health care community by adhering to the professional standards for safety and quality of care set by state and federal regulatory bodies	Core	

Related Technical Instruction

Medical Secretary

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Instructions for Use:

Registered apprenticeships must include at least 144 hours of related technical instruction (RTI). Courses offered by accredited colleges and universities may be assigned a credit hour determination rather than a contact hour determination. In general, an academic credit unit is the equivalent of 15 clock hours of instruction.

Development and Use of This RTI Outline: Employers and academic institutions may approach RTI in markedly different ways. Our goal was not to identify the single best way to provide RTI or to identify a single provider whose content we deemed to be superior. Instead, our goal was to survey numerous education providers, including employers, institutions of higher education, high schools, private continuing education providers, labor organizations, professional associations and, in some cases, municipalities that provide worker training, to identify topics or courses common among those providers that align with the job functions included in this work process schedule. Those common topics or courses are reflected in the RTI outline provided below, which may be useful in developing your RTI program or communicating your needs to an educational partner.

Licensure or certification requirements: Certification is available but not required. The National Healthcareer Association offers certification opportunities to become a Certified Medical Administrative Assistant (CMAA). The National Association of Health Unit Coordinators (NAHUC) also offers certification opportunities to become a Certified Health Unit Coordinator.

Degree requirements for licensure or certification, if applicable: Certification requires completion of a medical secretary education program or one year of experience and a high school diploma or GED.

Accreditation requirements of instructional provider for licensure or certification, if applicable: N/A

Anticipated changes in licensure or certification requirements, if known: None known

Examples of RTI providers for this occupation

Professional associations and labor organizations: none identified

Military: Patient administrative specialists receive on-the-job training while serving in the US military.

States/municipalities: none identified

Colleges and universities: Community colleges may offer short-term programs to prepare individuals for careers as medical secretaries. Medical assistant degree and certificate programs offer courses that are relevant to medical secretaries; however, medical assistants prepare to do much of the work of a medical secretary, but in addition they also prepare to perform certain clinical tasks and help physicians and other licensed providers conduct medical exams and procedures. A number of proprietary institutions offer certificate programs to prepare medical secretaries.

No-cost online providers: none identified

Continuing education or specialty education providers: StraighterLine provides low-cost courses in medical terminology.

Prerequisite knowledge, skills or experience typically required by RTI providers for this occupation

Employers generally require medical secretaries to hold a high school diploma or equivalent.

Working in a Medical Office

Hours: 20–30

Sample learning objectives

- Explain the roles and responsibilities of various members of the medical team and the legal scope of practice for each based on the laws in your state.
- Explain the role of medical referrals, medical orders, and medical records.
- Explain and differentiate between allowable and prohibited communication and information sharing under HIPAA rules.
- Explain the role of discretion and confidentiality in working with patients and patient records.
- Demonstrate the ability to communicate clearly, articulately, and properly through verbal, written, and electronic exchanges.
- Understand process for gathering documentation and charts of patient-provider encounters in real time for the electronic health records (HER) system.
- Utilize medical scribing to support communication between care provider team (optional).

Introduction to Computers

Hours: 20–30

Sample learning objectives

- Demonstrate the ability to log into a computer, access email and calendars, connect to Wi-Fi, and connect to a printer.
- Explain the different types of internet security threats as well as strategies for identifying, avoiding, and responding to these threats.
- Explain the importance of passwords and strategies for creating effective passwords.
- Demonstrate the ability to use word processing software to create letters, reports, and other types of correspondence.

Medical Terminology

Hours: 30–40

Sample learning objectives

- Explain the etymology of commonly used medical terms.
- Correctly identify the meaning of Latin prefixes, suffixes, and root terms commonly used in medicine.
- Describe the function of each of the body's major systems and use the correct terms to list the component organs and tissues of each system.
- Identify the medical specialist that treats each of the body's systems.
- Correctly identify commonly diagnosed medical conditions associated with each of the body's major systems.
- Explain how to find the correct spelling and definition of terms with which the student is not familiar.
- Understand and effectively use medical abbreviations.

Communication

Hours: 10–20

Sample learning objectives

- Explain the importance of clear communication and demonstrate the ways in which one can determine if patients or care providers have heard you and understand what you said.
- Demonstrate the ability to write emails using correct format, punctuation, and spelling and engage in verbal communication using correct sentence structure and grammar to provide instructions to patients regarding their appointment, the location of the medical office, any special preparation needed for the appointment, any records that the patient should bring with them to the appointment, and important office policies such as those related to payment at the time of service and missed appointments.
- Explain appropriate ways to communicate with people who do not speak English, who are deaf, or who are blind.
- Demonstrate the ability to send and receive information via electronic means (email, text messages, instant messaging, and facsimile).
- Demonstrate effective techniques for defusing anger, frustration, and confusion in interactions with patients and colleagues.
- Demonstrate the ability to use the appropriate medical terminology when communicating with members of the health care team.
- Describe and demonstrate effective strategies for communicating and coordinating with staff who work in other locations in which the health care provider treats patients.
- Demonstrate the ability to produce a business letter using standard format, correct spelling, and appropriate grammar.

Scheduling

Hours: 30

Sample learning objectives

- Describe the importance of strategic scheduling, including to accommodate procedures or exams that require patients to not eat or drink for a substantial amount of time before the appointment
- Explain and demonstrate effective ways to remind patients about upcoming appointments, adhere to missed appointment policies, and reschedule patients when the physician or the patient is unable to keep the scheduled appointment
- Identify the amount of time that should be allocated for various types of appointments, procedures, consultations, and follow-up appointments
- Differentiate between appropriate scheduling procedures for routine and emergency exams or procedures

- Describe various scheduling strategies for physicians who work in multiple offices or who participate in hospital rounds, surgical procedure,s or other activities in a location other than the physician’s office
- Differentiate between the types of exams or procedures that nurse practitioners, physician assistants, and physicians can provide and describe scheduling strategies for each
- Demonstrate the ability to assist patients in scheduling tests, procedures, exams, or therapeutic care provided by other medical specialists in different offices or facilities
- Demonstrate the ability to utilize electronic calendars

Working Effectively with Supervisors and Care Provider Teams

Hours: 30–40

Sample learning objectives

- Explain the meaning of the term “managing up” and the importance of the medical secretary in helping physicians and direct care providers manage their many responsibilities to patients, other providers, third-party payers, regulatory and government oversight agencies, and office or practice management.
- Explain the types of providers who work together to manage patient care in private practice, outpatient facilities, and in-patient care facilities.
- Describe the division of labor within medical offices of different sizes that operate within different types of facilities and rely on different sources of payment for care provided.
- Describe the multiple demands on care provider time, including regular office hours, emergency requests, hospital rounds, time spent in more than one office or in-patient/outpatient facility, pharmacy requests, entering electronic medical records, completing forms and documents, patient billing, staff management, and professional development. Explain the role of medical secretaries in helping care providers manage the various demands on their time and protecting them against burnout.
- Demonstrate the use of effective strategies for identifying the wants and needs of supervisors and develop action plans to effectively address those wants and needs.
- Discuss the importance of communicating with your direct supervisor to understand their needs, the office’s, and areas where the work of a medical secretary can improve personal and team performance.
- Engage in accurate and informative introspection to identify areas of work excellence as well as areas where more time, attention, or skills are required to better support the medical team or medical office.
- Demonstrate the ability to request and appropriately receive and respond to constructive criticism about work effectiveness, accuracy, and timeliness. Ask for guidance on expected work products, performance metrics, or performance goals, and evaluate effectiveness in meeting those expectations, goals, or metrics.

Medical Records

Hours: 10–20

Sample learning objectives

- Explain the importance of maintaining accurate, secure, and private records.
- Describe appropriate ways to maintain patient privacy through proper records storage.
- Demonstrate the ability to file electronic and paper records properly based on commonly used filing systems.
- Explain the benefits of electronic health records.
- Demonstrate the ability to upload, download, and send and retrieve electronic health records.
- Explain the need and demonstrate the ability to obtain patient consent to send or receive medical records.
- Demonstrate the ability to copy and send medical records according to patient or provider instructions.
- Explain strategies for long-term record maintenance and storage.
- Demonstrate the ability to provide appropriate medical records to third-party payers to facilitate timely payment for medical services.

Medical Billing and Coding

Hours: 15–20

Sample learning objectives

- Explain the principles and purpose of medical billing and coding.
- Differentiate between private-pay patients, private third-party payers, Medicare and Medicaid reimbursements; explain the requirements and restrictions related to each; and demonstrate the ability to provide accurate and complete submissions to third-party payers that result in timely payment.
- Demonstrate the ability to identify commonly used medical billing codes.
- Explain the importance of timely billing of patients and third-party payers.
- Explain the various options that can assist patients in managing and paying medical bills and discuss effective strategies for obtaining payments.
- Explain appropriate ways to remind patients of their payment responsibilities and differentiate between acceptable collections techniques and prohibited practices that may be perceived by patients as harassment.
- Demonstrate the ability to transfer delinquent accounts to third-party collection agencies.
- Demonstrate the ability to prepare complete and accurate bills, including all required supporting information.

- Demonstrate the ability to enter revenue and expenditures accurately and timely into accounting ledgers or electronic accounting systems.
- Demonstrate the ability to maintain accurate records regarding documents and information provided to third-party payers, as well as payments made by third parties and balances due that must be charged to patients.

Relevant military experience

Patient administrative specialists (MOS 68G) perform duties similar to those of medical secretaries, including scheduling and maintaining medical records; however, they typically do not participate in billing activities.

Diversity, equity, and inclusion

Black and Hispanic workers are represented in the medical secretary occupation in roughly the same proportion as their representation in the total population of working age Americans. On average, Hispanic, Black, and Asian workers earn higher average wages in this field than white workers. The average age of a medical secretary is 47, and only 9 percent of medical secretaries are men. There do not appear to be large-scale efforts to recruit more men into the field. The average age of medical secretaries may be high because younger workers tend to enter this field as medical assistants rather than medical secretaries (“Medical Office Secretary Demographics and Statistics in the US,” Zippia, accessed April 6, 2023, <https://www.zippia.com/medical-office-secretary-jobs/demographics/>).

Works Consulted

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