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.
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.
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.
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.
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.

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**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.

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare and manage budgets</td>
</tr>
<tr>
<td>Develop accounting and financial control systems</td>
</tr>
<tr>
<td>Prepare financial statements</td>
</tr>
<tr>
<td>Develop and conduct financial analysis</td>
</tr>
<tr>
<td>Develop and manage material procurement and payment systems</td>
</tr>
<tr>
<td>Develop coding and reimbursement policies and procedures</td>
</tr>
<tr>
<td>Facilitate investment planning, management and compliance</td>
</tr>
<tr>
<td>Establish business relationships with financial advisors</td>
</tr>
<tr>
<td>Establish fee schedules for physician services</td>
</tr>
<tr>
<td>Negotiate third-party contracts</td>
</tr>
<tr>
<td>Develop reconciliation systems for third-party payor reimbursement</td>
</tr>
<tr>
<td>Facilitate retirement planning, management and compliance</td>
</tr>
<tr>
<td>Maintain compliance with tax laws and filing procedures</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
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</thead>
<tbody>
<tr>
<td>Develop compensation and benefits programs consistent with the values of the organization</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Establish job classification systems</td>
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<td>☐</td>
<td>☐</td>
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<tr>
<td>Develop employee placement programs and facilitate workforce planning</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Establish employee appraisal and evaluation systems</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Develop and implement employee training programs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Establish employee relations and conflict resolution programs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Maintain compliance with employment laws</td>
<td>☐</td>
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</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop strategic plans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create business plans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create marketing plans</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Monitor and evaluate effectiveness of strategic, business and marketing plans</td>
<td></td>
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<tr>
<td>Pursue and establish partnerships and strategic alliances</td>
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<tr>
<td>Develop and implement community outreach, public relations and customer relations programs</td>
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</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
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</thead>
<tbody>
<tr>
<td>Conduct information system needs analysis</td>
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<tr>
<td>Facilitate information system procurement and installation</td>
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<tr>
<td>Develop and implement information system training and support programs</td>
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<tr>
<td>Oversee database management and maintenance</td>
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<tr>
<td>Develop information network security systems</td>
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<tr>
<td>Provide access to electronic education and information resources and systems</td>
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</tbody>
</table>

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.

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

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.

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

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.

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

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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advance professional knowledge and leadership skills</td>
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<tr>
<td>Balance professional and personal pursuits</td>
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<tr>
<td>Promote ethical standards for individual and organizational behavior and decision-making</td>
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<tr>
<td>Conduct self-assessments</td>
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<tr>
<td>Engage in professional networking</td>
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<tr>
<td>Advance the profession by contributing to the body of knowledge</td>
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<tr>
<td>Develop effective interpersonal skills</td>
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</tbody>
</table>

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**.
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 workplace 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.
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.
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.

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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.

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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.

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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 стратегических планов.

• 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 workforce 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.
Human Resource Management Task 3:
Develop employee placement programs and facilitate workforce 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.
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.
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/size 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.
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.
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 inquiries/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.
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 regimen (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, ACMPM 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


- **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
• **PITA factor** — acronym for “Pain In The Ass” factor denoting 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 specifications used in the ACMPE certification examination process.
References

Educational and Testing Reports and Publications

ACMPE Body of Knowledge for Medical Practice Management — Classification System: Knowledge, Skills and Abilities of the Medical Practice Executive, 1999, American College of Medical Practice Executives


References continued

**MGMA Publications**


Group Practice Personnel Policies Manuals: Set of 2. Courtney Price, PhD. *Group Practice Personnel Policies Manual*, 1997; and Alys Novak, MBA and Courtney Price, PhD.


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continued

Links to Other Information

http://www.swebok.org/documents/stoneman095/Trial_Version_0_95.pdf

http://www.sla.org/content/SLA/professional/meaning/competency.cfm

http://www.icmci.com/Documents/icmciUBK.html


http://www.acgme.org/outcome/comp/compFull.asp

http://www.pmi.org/publictn/pmboktoc.htm
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