



Cleveland Heights-University Heights City School District

MEDICAL/LEGAL/OFFICE ASSISTANT

COURSE OF STUDY

Grades 10-12

September 12, 2005

**Deborah S. Delisle
Superintendent of Schools**

STATEMENT OF APPROVAL

THIS COURSE OF STUDY HAS BEEN EXAMINED BY THE CLEVELAND HEIGHTS-UNIVERSITY HEIGHTS BOARD OF EDUCATION.

THE DOCUMENT WAS FORMALLY APPROVED FOR ADOPTION BY THE BOARD OF EDUCATION ON SEPTEMBER 12, 2005.

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MEDICAL/LLEGAL/OFFICE ASSISTANT CLEVELAND HEIGHTS-UNIVERSITY HEIGHTS CITY SCHOOL DISTRICT

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DISTRICT PHILOSOPHY

PHILOSOPHY OF EDUCATION

The educational organization, administration, development and programs within our school system are to be guided by the following premises:

1. All children are entitled to a public education that will encourage the fullest development of their individual talents.
2. Learning is essential to individual independence and the general welfare of the changing American society.
3. Effective learning develops both intellectual and emotional qualities and is for action; its proper evaluation lies in the quality of resultant activity, not mere response.
4. Organized education, a deployment of human and material resources as means toward learning, implies learning for all - - students, teachers, administrators -- at different levels of understanding and maturity.
5. Organized education is at its best when graced with experimental attitudes and dedicated to the proposition that all issues between organization and learning shall be resolved in favor of learning.
6. All rewards and penalties adopted in the organization of education become legitimate only insofar as they assist learning.
7. For purposes of learning and growth, internal motivations are more valuable than the external, such as, grades and competition.

The primary people in our school system are first, the students, and next, the teachers. Accordingly, they will be given primary consideration in any action taken by the Board of Education.

Our school system will provide training in the basic skills.

Our school system should provide a framework in which basic problem-solving and personal adjustment methods can be learned in an orderly, phased, and wholly accessible manner.

Our school system should educate toward both responsibility and responsiveness. It should provide greatly enriched conditions for individual growth in self-awareness, in a larger social awareness, and in controlled and meaningful response both to inner and outer influences. It should strive to heighten the developing student's appreciation of the cultural and individual diversity within the human family, and improve his/her skill in working harmoniously and creatively with that diversity, since this is a rich resource for innovative and successful growth.

A major effort of the teaching-learning process should be the early development of positive self-assurance and the continuing development of individual potential to deal with a changing society, to think rationally and creatively, to be independent and productive, and to choose rewarding life activities. Thinking, creativity, independence, productivity, and activity are also characterized by individual differences. Yet they must meet external requirements, and these change with the changing society.

*Ohio Administrative Code 3301-35-02

Approved by Board of Education February 9, 1970

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MEDICAL/LEGAL/OFFICE ASSISTANT

Course Objective: The course is designed to provide introductory training for students desiring future careers in medical, legal, financial, or general office settings. Students will develop an understanding of medical, legal, financial, and general office terminology, concepts, applications, principles, and computer integration used for medical, legal, and financial business enterprises.

Students are provided nine weeks instruction for the following units: medical, legal, financial, and general office skills.

Course Objectives and Student Performance Objectives

Unit 1: Medical Office Technology

Student will:

A. Know medical terminology

Student will demonstrate the ability to:

- 1. Demonstrate knowledge of basic medical word structures (e.g., prefixes, suffixes, combining word forms, terms pertain to the human body)**
- 2. Pronounce basic medical word structures (e.g., prefixes, suffixes, combining word forms, terms pertaining to the human body)**
- 3. Combine basic medical word parts to make complete medical terms**
- 4. Spell medical terms relating to the human body**
- 5. Demonstrate knowledge of basic body parts**
- 6. Identify the location (e.g., left, right, medial, proximal, quadrant) of various body parts**

Student will:

B. Process medical charts

Student will demonstrate the ability to:

- 1. Maintain confidentiality**
- 2. Demonstrate concern for detail and accuracy**
- 3. Key patient data**
- 4. Process changes of address for patients**
- 5. Compile medical reports/transfer information**
- 6. Transcribe reports for medical reports**

Student will:

C. Demonstrate knowledge of the fundamentals of medical insurance

Student will demonstrate the ability to:

- 1. Define basic health insurance terminology**
- 2. Differentiate between group and individual health insurance policies**
- 3. Identify various types of health insurance coverage used with basic and comprehensive policies (e.g., private, HMO, PPO)**
- 4. Identify the purposes of government-sponsored, prepaid medical care plans**
- 5. Identify the purposes of Workers' Compensation Insurance**

Unit 2: Legal Office Technology

Student will:

A. Identify the key components of standard client documents

Student will demonstrate the ability to:

- 1. Identify the key components of contracts and leases**
- 2. Identify the key components of bills of sale**
- 3. Identify the key components of wills, living wills, trusts**
- 4. Identify the key components of deeds**
- 5. Identify the key components of mortgages**
- 6. Identify the key components of promissory notes**
- 7. Identify the key components of powers of attorney**
- 8. Identify the key components of articles of incorporation**
- 9. Identify the key components of marriage arrangements (i.e., pre- and anti-nuptial)**
- 10. Identify the key components of divorce decrees**
- 11. Identify the key components of guardianship papers, release forms, consent forms**

Student will:

B. Identify the key components of common court documents

Student will demonstrate the ability to:

- 1. Identify the key components of answers**
- 2. Identify the key components of adoption papers**
- 3. Identify the key components of affidavits**
- 4. Identify the key components of bankruptcy papers**
- 5. Identify the key components of briefs**
- 6. Identify the key components of complaints**

- 7. Identify the key components of notices**
- 8. Identify the key components of summonses**
- 9. Identify the key components of subpoenas**
- 10. Identify the key components of child support papers**

Student will:

- C. Organize legal information and records**

Student will demonstrate the ability to:

- 1. Transcribe legal information**
- 2. Demonstrate concern for detail and accuracy**
- 3. Maintain confidentiality**

Student will:

- D. Demonstrate knowledge of legal terminology and structures unique to the legal setting**

Student will demonstrate the ability to:

- 1. Define common legal terms**
- 2. Demonstrate knowledge of the structure and contents of a typical law library**
- 3. Identify the components of the local, state, and federal justice systems**
- 4. Identify the structure of the local, state, and federal court systems**

Unit 3: Financial Services

Student will:

- A: Demonstrate knowledge of financial institutions**

Student will demonstrate the ability to:

- 1. Identify the primary functions of financial institutions (e.g., commercial banks, savings and loan associations, credit unions, credit card banks)**
- 2. Identify the functions of the Federal Reserve System and other regulatory agencies (e.g., Comptroller of Currency, FDIC, FSLIC, State Banking Department)**
- 3. Identify services typically provided by financial institutions**
- 4. Identify the roles and duties of various financial services positions**
- 5. Define financial services terminology**
- 6. Examine the factors of bondability (e.g., BCI check, drug screening)**

Student will:

B. Determine negotiability of checks

Student will demonstrate the ability to:

- 1. Identify the principles governing checking accounts (e.g., drawee, drawer, payer, signature card, contract)**
- 2. Identify the parts of a check**
- 3. Identify the rules governing the parts of a check**
- 4. Identify the parts of a check required for negotiability**

Student will:

C. Cash checks

Student will demonstrate the ability to:

- 1. Follow cashability requirements (e.g., signature, endorsement, accuracy, cashable maximums)**
- 2. Differentiate between foreign and “on-us” checks**
- 3. Identify the purpose of obtaining identification and its importance to financial institutions**
- 4. Identify acceptable and unacceptable types of identification (e.g., driver’s license)**

Student will:

D. Provide customer services

Student will demonstrate the ability to:

- 1. Identify financial products/services**
- 2. Identify deposits and withdrawals**
- 3. Compare/contrast savings bonds, traveler’s checks, cashier’s checks, and money orders**
- 4. Reconcile customer bank statements**

Student will:

E. Handle customer interactions

Student will demonstrate the ability to:

- 1. Identify behaviors (e.g., voice, tone, body language) for establishing successful customer relations**
- 2. Identify methods for dealing with negative customers**

- 3. Handle difficult customers**
- 4. Implement follow-up procedures**

Student will:

- F. Open new accounts (checking, savings)**

Student will demonstrate the ability to:

- 1. Prepare signature cards**
- 2. Prepare initial deposits**
- 3. Complete deposit slips**

Unit 4: General Office Procedures

Student will:

- A: Perform accounting functions**

Student will apply common record keeping principles to various financial situations:

- 1. Demonstrate knowledge of standard accounting practices by utilizing principles involving cash related transactions to complete accounting problems**
- 2. Process receivables**
- 3. Process payables**
- 4. Prepare financial reports (e.g., balance sheet, income statement)**
- 5. Identify the differences in a proprietorship, partnership, and corporation**
- 6. Perform payroll functions**
- 7. Maintain records and forms when given a bank statement, canceled checks, the check book balance, and a calculator.**
- 8. Prepare checks**

Student will:

- B. Complete filing functions**

Student will demonstrate the ability to:

- 1. Select filing method (i.e., alphabetical, chronological, numerical, geographical, subject)**

Student will:

- C. Office Etiquette**

Student will demonstrate the ability to:

- 1. Display telephone etiquette**
- 2. Operate telephone equipment**
- 3. Receive/screen calls**
- 4. Record/relay messages**
- 5. Ensure the accuracy of information received via telephone**

Student will:

- D. Create spreadsheets for business applications**

Student will:

- E. Create word-processing documents (e.g., graphs, tables, reports, proposals, newsletters, memos, letters)**

Student will:

- F. Create graphs and charts**

Student will:

- G. Deliver business presentation**