SWEETWATER UNION HIGH SCHOOL DISTRICT

DIVISION OF ADULT EDUCATION

Career Technical Education

## Medical Assistant - Administrative

### COURSE APPROVAL

##### Course submitted by:

##### \_Kristina Stanimirovich\_ \_Teacher\_\_\_\_ \_National City Adult\_\_\_\_\_\_

Name Position Site

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Signature Date

##### Course reviewed by CTE Coordinator

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Signature Date

##### Course approved by the Sweetwater Board of Trustees

May 22, 1975

##### Course Revision:

April 12, 1979

August 27, 1987

June 20, 1990 Formerly called Medical Office Procedures

December 16, 2002

December 13, 2004

Note: Title change from “Medical Secretary – Office Procedures Lab”

December 11, 2006

December 15, 2008

Note: Title change from “Medical Office Procedures”

July 26, 2010

July 23, 2012

May 12, 2014

June 27, 2016

## Medical Assistant - Administrative

##### Course reviewed by Members of the Industry Advisory Board (EAB)

1. **\_\_**Frances Cervantes**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_**5/28/14**\_\_\_\_\_\_\_\_\_\_\_**

Name of Advisory Committee Member Date

**\_**Minojosa Medical**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_**MA**\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Place of Business Occupation

2. **\_**Velma Alexander**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_**3/12/2012**\_\_\_\_\_\_\_\_**

Name of Advisory Committee Member Date

**\_**Acclaim Health Care**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_**President/Owner**\_\_\_**

Place of Business Occupation

3. **\_\_**Karen Siegiel**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_**3/3/2011**\_\_\_\_\_\_\_\_\_**

Name of Advisory Committee Member Date

**\_\_**Orthopedic Surgery Office **\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_**Biller Analyst, Medical Coder

Place of Business Occupation

4. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Name of Advisory Committee Member Date

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Place of Business Occupation

5. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Name of Advisory Committee Member Date

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Place of Business Occupation

## Medical Assistant - Administrative

# Basic Course Information

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| **Course Title:** | **Medical Assistant - Administrative** |
| **CTE Industry Sector:** | **Health Science & Medical Technology** |
| **Career Pathway:** | **Health Information Services** |

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| **Course Level:** |  | Introductory | x | Concentration | x | Capstone |

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| **Course Number:** | **1643** |
| **CBEDS Title:** | **Medical Office** |
| **CBEDS Number:** | **4275** |
| Course Hours: | 360 hours of theory and labs and a minimum of 160 hours of externship or until satisfactory completion of all assigned materials. |
| Prerequisites: | **8th Grade Reading Level** |
| Evaluation: | Evaluation of individual achievement is based upon satisfactory completion of a minimum of 75%  in the following areas:   1. Understanding and appropriate use of common medical terms and abbreviations. 2. Comprehension of basic anatomy and physiology of the human body. 3. Appropriate demonstration of interpersonal communication. 4. Computer assignments including; keyboarding speed and accuracy, basic word processing, composing and formatting business correspondence, internet research, and special projects. 5. Satisfactory application of appointment scheduling and telephone techniques. 6. Understanding of legal aspects of health care delivery, medical etiquette, and ethics. 7. Participation in class discussions, exercises, and role play assignments. 8. Written topic specific assignments as selected by the instructor. 9. Satisfactory participation in oral and written individual and group presentations. 10. Satisfactory demonstration of various office procedures including; alphabetic and numeric filing, ordering equipment and supplies, and handling mail. 11. Demonstration of basic math skills and application. 12. Understanding of basic financial administration including; insurance claims, bookkeeping, banking, fees and collections. 13. Duties and responsibilities of the medical office manager. |
| Conditions for Repetition: | Students who have failed to satisfactorily complete the course objectives and/or competencies may, with permission, repeat the course. |
| **Articulation Information:** | Southwestern College  Medical Office Procedures (MEDOP 231) |
| **Articulation Credit:** | 4 units |
| **High School elective Credit:** | This course is offered on a CREDIT/NON-CREDIT basis. A student may earn one (1) high school elective credit for each sixty-hour of productive attendance. Up to eight (8). |
| **Advisory Committee Meetings:** |  |

**Course Description**

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| Medical Assistant-Administrative is an intensive hands-on career technical education course with an emphasis on attaining competency in fundamental skills such as customer service, the use of common medical terms and abbreviations, patient appointment scheduling, telephone techniques, medical office etiquette, filing, billing, finances, and maintenance of the medical record. Students develop basic skills in data entry and retrieval, internet research, and word processing in order to prepare medical documents and correspondence. Students become familiar with legal aspects and ethics as they pertain to the health care environment.  This course prepares students to obtain entry-level positions in a variety of health care settings, including: physician’s offices, clinics, laboratories, hospitals, and health insurance companies. Instruction is provided in job search strategies; resume preparation, and interviewing techniques. |

**Instructional Strategies**

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| Teacher lectures and demonstrations ….30% Class discussions/exercises 15% Lab practice on computers 25%  Lab practice on typewriters, calculators………………………………………..5%  Group/individual reports/ projects………………………………………………5%  Role playing/mock interviews 4%  Guest speakers 1%  Evaluations ...………15% |

**Instructional Materials**

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| Textbooks: Medical Assisting: Administrative and Clinical Competencies, 6th Edition text & workbook  Keir, Wise, and Krebs |

**Career Plan: How this Course fits into the Course Sequence**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Sequence of Courses** | **Course Level** | | | **Primary Funding Source** | | **Perkins**  **Funded** | **Total Duration** |
| **Name of Course** | **Intro.** | **Concentration** | **Capstone** | **District/COE** | **ROCP** | **Yes or No** | **(In hours)** |
| Medical Terminology |  |  |  |  |  | Yes | 162 |
| * Student can choose from the following groups: | | | | | | | |
| Medical Assistant – Administrative |  |  |  |  |  | Yes | 520 |
| Medical Assistant – Clinical Theory |  |  |  |  |  | Yes | 360 |
| Medical Assistant – Clinical Externship |  |  |  |  |  | Yes | 160 |

**Occupations for Identified Pathway**

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| --- | --- |
| Pathway occupations organized by level of education and training required for workplace entry.(Asterisked occupations require certification or licensure.) | |
| Postsecondary Training (certification and/or AA degree) | College University (bachelor’s degree or higher) |
| Medical AssistantMedical ReceptionistsMedical Records Clerks | • Health Service AdministratorsHospital/Home Administrators |

# Course Goals

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| 1. Gain an introduction to the background of the Health Science & Medical Technology Industry as well as the qualifications of successful Medical Assistant-Administrative. |
| 1. Acquire the knowledge and skill necessary to operate computer programs used in medical facilities. |
| 1. Develop an ability to perform various office procedures utilized in the medical field. |
| 1. Acquire the vocabulary needed to work in the medical field. |
| 1. Become aware of employment opportunities available in this field and procedures for pursuing those opportunities. |
| 1. Develop appropriate language and mathematical skills as needed in a medical office environment. |
| 1. Acquire a basic knowledge of health insurance claims, including; group and private, managed care, and government sponsored programs such as Medicare, Medi-Cal, and TRICARE. |
| 1. Realize the importance of compliance with HIPAA regulations when handling or communicating confidential health and medical information. |
| 1. Become familiar with documents utilized in health care such as; Authorization for Release of Information, Notice of Privacy Practices, Advance Directive, and Power of Attorney. |
| 1. Understand the content and diverse uses of health information and the use of legal and regulatory guidelines to maintain, store, and communicate accurate and appropriate information. |
| 1. Acquire knowledge of the quantitative and qualitative requirements that apply to health information and how to analyze the information for designated purposes. |

# Instructional Module/Unit

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| --- | --- | --- | --- | --- | --- |
| **Unit 1** | **Introduction** | Class Hrs. | 4 | Lab Hrs. | **2** |

Description:

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| Students gain an introduction to the course and learn class expectations. They are introduced to the common traits exhibited by people successfully working in this field, personal qualifications, interests, aptitudes, and knowledge of skills necessary to succeed this career pathway. Students examine the historical and economic background of this field as well as current opportunities available. In addition students will examine the personal, professional, and educational requirements needed to meet their goals. |
| **Unit 1 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Identify the personal qualifications, interests, aptitudes, knowledge and skills of successful **Medical Assistant-Administrative.** |
| **2.** Demonstrate an understanding of personal, professional, and educational requirements of this career field. |

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| **Unit 2** | **Computers in Health Care Facilities** | Class Hrs. | 7 | Lab Hrs. | **35** |

Description:

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| Students develop and apply basic computer skills required in a medical office. Students improve keyboarding speed and accuracy, learn appropriate formats for business correspondence, and create documents and reports utilized in a medical office environment. Patient intake information, recording of financial and insurance data, and basic bookkeeping procedures are emphasized. |
| **Unit 2 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Input information |
| **2.** Retrieve Data |
| **3.**Conduct Research |
| **4.**Create reports |
| **5.**Produce statements |
| **6.**Prepare correspondence |
| **7.**Complete claim forms |
| **8.**Medical practice management |
| **9.**Microtype 5 typing system |

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| **Unit 3** | **Administrative Procedures** | Class Hrs. | 15 | Lab Hrs. | 46 |

Description

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| Students gain familiarity with the daily administrative functions required in a medical office setting. Students gain knowledge and skills in filing, scheduling appointments, oral and written communications, professional correspondence, and the preparation and maintenance of medical records. |
| **Unit 3 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Prepare patient charts, and alphabetically and numerically file medical records and reports. |
| **2.** Demonstrate duties required at a reception desk including; scheduling appointments, answering the telephone, screening calls, recording messages, patient registration, and documenting and correction of information in the medical record. |
| **3.** Demonstrate knowledge of methods of medical documentation. |
| **4.** Utilize the Peg Board basic bookkeeping system to post charges, credits and adjustments to patient accounts. |
| **5.** Compose and prepare properly formatted collection letters for delinquent accounts. |
| **6.** Demonstrate completion of medical documents such as patient information/intake forms, release of information, and treatment authorizations. |
| **7.** Demonstrate an understanding of HIPAA regulations. |
| **8.** Respond appropriately to medical office emergencies. |
| **9.** Demonstrate an understanding of Universal Precautions and proper disposal of bio-hazardous waste. |
| **10.**Scanning documents |
| **11.**HIPAA compliance sign-in sheet |
| **12.**Adressing patients with disabilities |
| **13.**Classification of mail |
| **14.**Office supply inventory |

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| **Unit 4** | **Medical Terminology** | Class Hrs. | 20 | Lab Hrs. | **30** |

Description

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| Students become familiar with medical prefixes, suffixes, word roots and combining forms as derived from Greek and Latin origins. Students will identify word part meanings and dissect medical terms to determine the definition. Medical terminology is presented in a body systems approach in conjunction with the study of basic anatomy and physiology. |
| **Unit 4 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Define and appropriately use common medical terms and abbreviations. |
| **2.** Demonstrate knowledge of basic human anatomy and physiology by knowing the location and function of major structures as they relate to body systems. |
| **3.** Demonstrate the ability to locate information using medical references, including a medical dictionary and the Physician’s Desk Reference (PDR). |
| **4.** Demonstrate the ability to understand diagnostic and procedural terms as related to the processing of medical insurance claims. |
| **5.** Understand and utilize language associated with the use of commonly used medications and treatments. |
| **6.** Recognize the symbols and abbreviations used in prescriptions. |
| **7.**Abbreviations |

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| **Unit 5** | **Math & Language Skills** | Class Hrs. | 10 | Lab Hrs. | **30** |

Description

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| Students practice using mathematics and language skills in a variety of activities related to working in a health care environment. Students improve basic math, spelling, grammar and composition skills through practice and application. |
| **Unit 5 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Demonstrate the ability to accurately add, subtract, multiply and divide. |
| **2.** Demonstrate the ability to accurately calculate percentages. |
| **3.** Demonstrate the ability to compose written correspondence. |
| **4.** Demonstrate improvement in oral and written communications. |
| **5.** Demonstrate an understanding of non-verbal communication. |
| **6.** Demonstrate knowledge and application of active listening skills. |
| **7.** Follow directions. |

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| **Unit 6** | **Health Insurance** | Class Hrs. | 14 | Lab Hrs. | **30** |

Description

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| Students are introduced to major types of health insurance plans. Students become familiar with diagnostic and procedural coding systems utilized in the preparation of outpatient health care claims. Students prepare CMS-1500 claim forms using source documents from the patient medical record. |
| **Unit 6 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Accurately describe the elements of Medicare, Medi-Cal, TRICARE, Workers’ Compensation, group health insurance, PPO's, HMO's, and private insurance policies. |
| **2.** Demonstrate the ability to locate medical diagnostic and procedural codes using the International Classification of Diseases (ICD-9) and Current Procedural Terminology (CPT) manuals as used in medical claims. |
| **3.** Prepare health insurance claims. |
| **4.** Identify ways to prevent the rejection of claims and the appeals process. |
| **5.**Medical referrals |
| **6.**ICD-10 CM ICD-10 PCS |
| **7.**Pre-certification and pre-authorization; referrals |
| **8.**Differentiate between primary and secondary insurance |
| **9.**Insurance coverage |
| **10.**Birthday rule |
| **11.**Reporting fraud |
| **12.**UB-04 form |

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| **Unit 7** | **Legal and Ethical Considerations** | Class Hrs. | 10 | Lab Hrs. | **25** |

Description

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| Students become familiar with the ethical and legal implications associated with working in a health care setting. Proper use and disclosure of medical information is emphasized. Students explore, discuss, and report on ethical issues affecting health care. |
| **Unit 7 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Know the process for managing and transferring protected health information (PHI) accurately to the authorized parties. |
| **2.** Know the legal and regulatory requirements under HIPAA for compliance with privacy and security standards. |
| **3.** Recognize the purpose and implications of the Good Samaritan Act. |
| **4.** Understand the concept of medical ethics and medical etiquette. |
| **5.** Differentiate between implied and informed consent. |
| **6.** Recognize the importance of performing duties within the accepted scope of practice. |
| **7.** Demonstrate an understanding of patient rights. |
| **8.** Differentiate between civil and criminal law. |
| **9.** Know the definition of common legal terms including; subpoena, malpractice, tort,  negligence, abandonment, and statute of limitations as they relate to health care . |
| **10.** Understand the meaning and purpose of a living will, health care power of  attorney, and a DNR order. |
| **11.** Recognizetheir role as a mandated reporter in cases of abuse. |
| **12.**Securing charts |
| **13.**Confidential communication |
| **14.**Penalties for violating HIPAA practices |
| **15.**OSHA guidelines and reporting |
| **16.**Exposure control |
| **17.**Evacuation plan |

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| **Unit 8** | **Health Information/Medical Records** | Class Hrs. | 10 | Lab Hrs. | **37** |

Description

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| Students will gain an introduction to the documentation that is required in this industry. They will also be introduced to the proper documentation methods as well as storage. |
| **Unit 8 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Understand the process for determining, interpreting, and accurately documenting required information. |
| **2.** Understand the documentation and storage systems in use. |
| **3.** Know the process for preparing and disseminating information to various audiences by using established information systems that operate within legal and regulatory guidelines. |
| **4.** Understand the information systems used by the organization, including how information is organized and integrated for timely, accurate dissemination. |
| **5.** Formulate and report information clearly and concisely. |
| **6.** Know the process for assessing information systems and making recommendations for improvement. |

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| **Unit 9** | **Critical Thinking** | Class Hrs. | 50 | Lab Hrs. | **15** |

Description

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| Students improve critical thinking and problem-solving skills by the evaluation of scenarios involving protected health information, its access and disclosure. Students become aware of the legal exceptions of disclosure under HIPAA. Students determine the appropriate course of action for a variety of situations encountered in the medical office. |
| **Unit 9 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Know the process for assessing whether information is reported and disseminated within legal and regulatory bounds. |
| **2.** Know the process for assessing information required by patients, staff, and the community to determine the best course of action. |
| **3.** Students learn to determine the appropriate action in a variety of situations commonly encountered in a medical office. |

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| **Unit 10** | **Employment Opportunities/Career** | Class Hrs. | 5 | Lab Hrs. | **10** |

Description:

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| Students create a sample cover letter, personal resume, completed job application, thank you letter, and list of personal references. They develop their personal career portfolio that contains documents for getting a job as well as a career plan and selected work samples. Students practice appropriate interviewing techniques. |
| **Unit 10 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** Demonstrate the ability to write a cover letter. |
| **2.** Demonstrate the ability to complete a job application. |
| **3.** Demonstrate the ability to write a resume. |
| **4.** Demonstrate successful job interview skills. |
| **5.** Conduct job search activities utilizing newspapers, online resources, community resources and networking. |
| **6.** Demonstrate professionalism in dress, personal hygiene, work habits, language, telephone etiquette, and face-to-face interaction with others. |
| **7.** Know how to obtainHealth Care Provider CPR Certification and California certification examination Medical Assistant – Administrative. |

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| **Unit 11** | **Work-Based Learning Experience** | Class Hrs. |  | Lab Hrs | **160** |

Description

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| Students will gain unpaid work experience in a health care setting. Students will have the opportunity to apply newly learned skills and demonstrate work based expectations. Student will demonstrate punctuality, dependability, professionalism and the ability to follow directions in the workplace. Students will engage in discussions with the instructor regarding workplace experiences and the day-to-day aspects of employment in a health care environment. |
| **Unit 11 Competency:** Upon Completion of this unit, the student is able to: |
| **1.** .Demonstrate the ability to work successfully in the Health Science & Medical Technology Industry. |
| **2.** Demonstrate the ability to “go to work” with a proper attitude towards the work place expectations of punctuality, professionalism, dress, demeanor, and telephone etiquette. |

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| **Totals** | **Theory Hrs.** | **100** | **Lab Hrs.** | **260** | **Total Hrs.** | **360** |

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| **Totals** | **Externship Hours** | **160** | **Total Hrs.** | **160** |

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| **Total Hrs.** | **520** |

**APPENDIX A:**

**MATRIX FOR ALL ASPECTS OF THE INDUSTRY**

All Aspects of the Industry is a key element of the Carl D. Perkins Vocational and Applied Technology Education Act and the School-to Work Opportunities Act. Both acts emphasize giving students a comprehensive perspective and range of skills across an industry. The Perkins Act requires programs to “provide students with strong experience in and understanding of all aspects of the industry students are preparing to enter”. The Act identifies eight aspects in particular, which are common to any business or industry. Programs receiving Perkins funds are required to include the teaching of these concepts to provide students with the skills necessary to be successful in their employment.

**STRATEGIES**

Below is a matrix showing the components of “All Aspects of the Industry for the *name of Course*.” A list of strategies is provided for each component.

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| --- | --- |
| **ASPECTS** | **SEQUENCE OF COURSES** |
|  | **Course 1:**  **Medical Assistant - Administrative** |
| **Planning** | Students develop skills required to manage general clerical operations in a medical environment. Students develop an understanding of responsibilities and actions required to prepare for a typical day. The importance of proper appointment scheduling in order to optimize patient flow while accommodating the needs of the patient and physician/provider are emphasized. |
| **Management** | Students develop a variety of skills and abilities needed to manage clerical and basic financial operations in a medical office environment. Time management strategies, employee/employer responsibilities, interpersonal relationships, and general management concepts are covered. The proper handling and use of protected health information is stressed. |
| **Finance** | Students are introduced to basic bookkeeping and banking procedures, preparation of insurance claims, accounts receivable and payable, patient billing, credit arrangements, and collection of delinquent accounts. |
| **Technical &**  **Production Skills** | Students are required to produce a variety of medical documents and reports utilizing computer technology. Written and oral communication using medical vocabulary associated with specific areas of study is required. Students are required to recognize and adhere to legal and ethical guidelines related to employment in the health care field. |
| **Underlying Principles**  **Of Technology** | Students are required to demonstrate basic math and language skills required to perform administrative functions in a medical office environment. An emphasis is placed on improving critical thinking and problem solving abilities. |
| **Labor Issues** | Students are introduced to basic areas of employment law, including issues related to discrimination, sexual harassment and the Americans with Disabilities Act. Students become familiar with documents such as the W-2, W-4 and I-9. Students are also introduced to OSHA regulations. |
| **Community Issues** | Students learn about behaviors that influence health. Issues affecting the community, state, and country are discussed. Guest speakers from local health care organizations discuss specific areas of concern such as breast health and early detection of cancer. An advisory committee of health care employees is consulted regarding current industry standards and expectations. |
| **Health, Safety, &**  **Environmental Issues** | Issues regarding health and safety are addressed throughout the course. Students become familiar with state and federal agencies governing health and safety issues. Students develop an awareness of the effects of endemic and pandemic disease. Students are introduced to OSHA regulations, and prevention of injury in the workplace. Students become familiar with the importance of a disaster plan. |

Standards-Aligned Course: PLC work in progress

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| **Instruction Unit / Subunits** | **Concepts/Skills** | **Benchmarks** | **Student Learning Outcomes** | **Model Curriculum Standards**  **Mentioned = M Reinforced = R Taught = T** | | | | | |
| K & P Anchor |  | Pathway |  | Other |  |
|  |  |  |  |  |  |  |  |  |  |
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