About MGMA
Medical Group Management Association (MGMA) is the premier membership association for professional administrators and leaders of medical group practices. Since 1926, MGMA has delivered networking, professional education and resources, and political advocacy for medical practice management. Today, MGMA's 22,500 members lead 13,600 organizations nationwide in which some 280,000 physicians provide more than 40 percent of the healthcare services delivered in the United States.

MGMA's mission is to continually improve the performance of medical group practice professionals and the organizations they represent. MGMA promotes the group practice model as the optimal framework for healthcare delivery, assisting group practices in providing efficient, safe, patient-focused and affordable care. The American College of Medical Practice Executives (ACMPE) is the standard-setting and certification body of the Medical Group Management Association (MGMA), and promotes the professional growth of leaders. By developing the Body of Knowledge for Medical Practice Management, ACMPE provides a central framework for MGMA resources. MGMA is headquartered in Englewood, Colo., and maintains a government affairs office in Washington, D.C. Please visit mgma.com
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We encourage you to share it:

› Educate others about the profession by sharing the Body of Knowledge with colleagues, staff, physicians, faculty, students and business associates. For additional free copies of this brochure (Item 5961), visit mgma.com/bok or call toll-free at 877.275.6462, ext. 1888.

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    The Body of Knowledge for Medical Practice Management was developed by the American College of Medical Practice Executives® (ACMPE®), the standard-setting and certification body of the Medical Group Management Association® (MGMA®).
What does it take to be a successful medical practice management executive?

You are in one of the fastest growing and most rewarding careers in healthcare management. The role of a medical practice executive is demanding — and always evolving. It requires mastering a broad knowledge base and a deep skill set unique to the group practice environment.

How do you objectively define the roles and responsibilities of a medical practice management executive? What qualities and competencies must the successful executive possess? How do you assess an individual’s performance? How will you assess your own capabilities?

Just ask the medical practice executives who used the Body of Knowledge for Medical Practice Management to become Certified Members and Fellows of the American College of Medical Practice Executives (ACMPE). Ask the medical group practices across the country, big and small, that use it to develop job descriptions and professional development plans. Ask the university and college health administration programs that use it to develop their curricula. Ask the countless professionals who have already used it to advance their careers.

The Body of Knowledge is the most comprehensive, authoritative resource for those who seek to assess and develop their skills and knowledge in this profession.

What is the Body of Knowledge?

The Body of Knowledge for Medical Practice Management encompasses a broad spectrum of information about the profession. It defines the unique knowledge and skill set for the medical practice management executive.

The role of a medical practice management professional is decidedly dynamic. Changes in the healthcare industry, healthcare legislation, technological leaps in information management and many other factors contribute to the constant evolution of the profession. Every book that’s written, every article published, every change in legislation — they all add to the Body of Knowledge.

Quite simply, the Body of Knowledge is the authoritative guide to managing a successful medical group practice.

What is the origin of the Body of Knowledge?

The Body of Knowledge for Medical Practice Management was developed by the American College of Medical Practice Executives (ACMPE), the standard-setting and certification body of the Medical Group Management Association (MGMA) utilizing a role delineation study and an expert panel of medical practice executives to define and legitimize the unique knowledge and skill set for the medical practice management profession.

The Body of Knowledge determines the content and structure for a valid and reliable certification program as well as developing educational resources. The Certified Medical Practice Executive (CMPE) and Fellow in ACMPE (FACMPE) designations are the accepted marks of excellence in the profession.

THE BODY OF KNOWLEDGE:

- Developed by the American College of Medical Practice Executives (ACMPE) in conjunction with an expert panel of medical practice executives
- Defines and documents the professional competencies and areas of responsibility, or domains, required for successful medical group management
- Outlines the knowledge and skills necessary to attain board certification in medical practice management through ACMPE

Engage in continuing education: Many universities and colleges use the Body of Knowledge to develop curricula. The ACMPE uses the Body of Knowledge for its certification program. MGMA uses it to develop education and information resources. Stay up-to-date with the most current continuing education in the profession.
How will you use the Body of Knowledge?

Think of the Body of Knowledge for Medical Practice Management as a blueprint outlining the knowledge and skills to guide your professional development and make your medical practice successful.

ASSESS

› Evaluate your skills and knowledge: Use the Body of Knowledge to identify your capabilities in practice management.

LEARN

› Engage in continuous education: Take advantage of MGMA’s education programs for every level of experience, from novice to executive. Conferences, seminars, books and online courses focus on expanding your knowledge and skills. Visit mgma.com/acmpe for a comprehensive list of resources.

CERTIFY

› Become certified: Obtain certification through ACMPE, which is considered a mark of excellence and proof of professionalism in the medical practice management field. ACMPE board certified professionals and Fellows demand higher salaries than noncertified professionals.

EXCEL

› Advance your career: Use the Body of Knowledge as the foundation for your job description, compensation structure and employment contract.

› Improve your practice: Benchmark key areas of your practice operations using the Body of Knowledge as the foundation of an operational assessment.

› Manage your staff and educate your physician leaders: Benchmark staff performance reviews, establish professional development plans and inform your physician leaders about the key success factors in practice management.

The Structure of the Body of Knowledge

The Body of Knowledge has been outlined to identify the various knowledge and skills required of today’s medical practice executive. Competencies are woven among eight distinct knowledge areas or domains. Within each domain are tasks or statements detailing the responsibilities that comprise that knowledge area. Tasks are further delineated as specific skill statements. Visit mgma.com/bok to view the most up-to-date tools, resources and educational opportunities.

Competencies

Competencies are essential themes threaded throughout the Body of Knowledge and form the strong foundation for successful job performance. Pages 4-5 describe the four competencies, or skill sets crucial to performing each domain successfully.

Domains

A body of knowledge is organized into major areas of responsibility, called domains. Pages 6-21 present the eight domains in the Body of Knowledge for Medical Practice Management.

Tasks

Tasks are individual job responsibilities, activities and functions. Each domain in the Body of Knowledge is defined by a series of tasks. Each task is further broken down into an outline of essential knowledge and skills required to accomplish the specific task.
What qualities and competencies must the successful executive possess? There are four competencies that are critical across every role and responsibility a medical practice management professional performs: professionalism, leadership, communication skills and critical thinking skills. They form the strong foundation for every aspect of successful job performance. For more information and up-to-date resources visit mgma.com/bok.

Professionalism
A commitment to achieving professional standards that enhance personal and organizational integrity and contribute to the profession.

- Commit to competence, integrity, altruism and promotion of the public good
- Commit to self-assessment and continuous learning
- Support collegial relationships with peers through networking, information-sharing and mentoring
- Participate in and encourage service and volunteer activities to support the development of colleagues, staff and the community
- Demonstrate and promote cultural sensitivity
- Demonstrate knowledge of the healthcare system and the environment in which it operates
Leadership
Collaborating with and supporting the practice’s physician leadership to provide strategic direction to the organization.

- Uphold and advocate ethical standards and decision-making
- Foster teamwork between clinical and administrative staff
- Understand effective techniques for working with boards and governance structures

Communication skills
The skills necessary to elicit multiple points of view from internal and external sources, facilitate constructive interaction and present information clearly and concisely.

- Write clearly and effectively
- Speak clearly and effectively before individuals and groups in formal and informal settings
- Develop effective interpersonal skills
- Seek out and incorporate the views of stakeholders for decisions that affect the quality of care, work environment and business stability of the organization

Critical thinking skills
A systematic, logical 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.

- Collect and analyze data from internal and external sources relevant to each situation
- Demonstrate the ability to discriminate between important and superfluous aspects of situations to support sound decision-making
- Ask the right questions when making decisions

- Focus on implementation of organizational strategy
- Inspire others toward a shared vision
- Support innovation and creativity
- Demonstrate effective change management skills to ensure effective patient care and safety as well as improve practice performance
- Understand and effectively manage expectations

- Listen and respond effectively to the ideas and thoughts of others
- Recognize and use nonverbal forms of communication
- Demonstrate effective negotiation and facilitation skills
- Support and promote effective conflict resolution
- Provide effective communication linkages within the organization and to its external environment

- Understand cause-and-effect relationships
- Learn from mistakes
- Manage the overload of information and stress generated from diverse situations that occur in the practice and in your personal life
- Implement planning methods and tools, including project management, process improvement and systems thinking
How do you develop and implement an effective business plan? How do you ensure the effective management of day-to-day operations? Business operations in a medical practice include planning, purchase of materials and equipment, facilities management and maintenance, business partnerships, and marketing and communication plans.

“Today’s changing market demands education, business savvy and human relation skills that only a manager who has achieved credentialing in ACMPE can offer.”

– Katherine Mack, business/case manager, Coastal Physical Medicine and Rehabilitation Services, New Bern, N.C.
4 Manage discernment process for identification and utilization of outsourced expertise and business partners.
   ➤ Determine the need for outsourced expertise for the organization
   ➤ Establish selection requirements and process for business partners
   ➤ Pursue and establish partnerships and strategic alliances to strengthen competitive position
   ➤ Understand the typical knowledge and skills that financial advisors, accountants, attorneys, architects and others can provide to the practice
   ➤ Effectively manage and monitor partnerships and alliances

5 Develop and implement a marketing and communications plan.
   ➤ Focus on customers, including patients, other physicians and groups, payers, vendors and the community
   ➤ Apply the components of marketing and communications plans, including situational analysis, market analysis and consumer analysis
   ➤ Analyze local market trends, demographics and current economic influences
   ➤ Employ marketing research, market strategy and advertising
   ➤ Use public and media relations
   ➤ Establish corporate image and branding strategy
   ➤ Promote community outreach and collaboration

Refer to the Patient Care Systems domain for tasks that relate to the operational processes surrounding the patient encounter.

**RECOMMENDED RESOURCES:**
For current Business Operations articles, tools, resources and education programs visit mgma.com/BOKBusinessOperations.
How do you develop and maintain financial systems to ensure a profitable practice? Financial management in a medical group requires skills in accounting, budgeting, revenue cycle management and financial analysis.

Financial Management

1 Develop and implement the organization’s budget to achieve organizational objectives.
   › Understand types of accounting, including financial, tax and managerial
   › Apply financial accounting principles, including generally accepted accounting principles (GAAP)
   › Understand cash and accrual accounting and modified accrual accounting
   › Understand budgeting, types of budgets and budget methodologies
   › Oversee accounts payable and accounts receivable
   › Implement a chart of accounts
   › Understand methods of depreciation
   › Track the flow of financial information
   › Understand accounting systems and software
   › Understand capital financing

2 Establish internal controls for cash management.
   › Assess risk and identify where potential loss can occur
   › Implement bank reconciliation procedures
   › Establish a process to monitor and evaluate internal financial control processes
   › Monitor actual revenue and expenses to budget and prior period amounts on a regular basis
   › Develop standard procedures and separation of responsibilities for accounting functions
   › Reconcile the billing system with the accounting system
   › Develop and implement policies for approvals, authorizations, verifications, check signing and invoices

3 Implement and maintain a process for external financial audits.
   › Determine need for an external audit, review or financial compilation for the practice’s financial statements
   › Understand types of audits and audit reports
   › Comply with generally accepted auditing standards (GAAS)
   › Establish effective relationships with accountants and auditors
4 Develop and implement revenue cycle management and accounts receivable management.

› Manage front-end operations, including scheduling, insurance verification, authorizations, co-pay collection, medical record process, etc.
› Oversee medical record documentation, encounter form and coding
› Manage charge audit, charge entry and fees
› Ensure proper claims submission and edits
› Implement accounts receivable follow-up, including paid claims, unpaid claims, denied claims, insurance collections and patient collections
› Monitor net charges and cash collections trends, days in accounts receivable, percent of accounts receivable more than 90 days

5 Analyze and monitor financial performance and report financial results to stakeholders.

› Understand elements of financial statements, including balance sheet, assets, liabilities, equity, investments, distributions, revenues, expenses, gains, losses and income
› Conduct financial analysis, including measures of profitability, profitability ratios, current/prior period comparison, comparisons by department/location/division and productivity analysis
› Conduct financial benchmarking, including revenue, expenses, adjusted collection rate, collection rate by payer, payer mix, reimbursement, productivity, accounts receivable and profitability
› Communicate financial information to stakeholders such as graphs, narratives, presentations, dashboards, scorecards and executive summaries

6 Direct the payroll process.

› Establish policies and procedures to ensure the organization is paying employees the correct amount for the exact hours worked
› Implement reporting system to gather employee work hours
› Ensure accurate record-keeping for payroll records
› Ensure regulatory compliance for payroll filing, including Federal Insurance Contributions Act (FICA), social security, deferred compensation and workers’ compensation
› Establish guidelines and process for monitoring payroll recorded benefits
› Complete all payroll audits as required by tax agencies, insurers or government entities

7 Establish and maintain the organization’s banking, investment and other financial relationships.

› Develop effective working relationships with bankers, accountants, auditors, consultants, real estate professionals, life insurance professionals, attorneys and other outside financial professionals
› Establish periodic regular review with physicians regarding financial relationships

8 Develop relationships with individual insurance carriers to optimize contract negotiations and maintenance of existing contracts.

› Establish formal review of insurance carrier contracts as well as auditing contract payments
› Analyze payer performance, including timely payment, correctness of payment and denials
› Manage contracts
› Develop negotiation skills
› Establish personal contacts within each major carrier

RECOMMENDED RESOURCES:

For current Financial Management articles, tools, resources and education programs visit mgma.com/BOKFinancialManagement.
How do you utilize human resources to achieve and enhance organizational performance? Human Resource Management involves staff recruitment and retention, an effective staffing strategy, training, a performance evaluation process, a personal commitment to enhancing your knowledge base and compliance with employment laws.

1 Coordinate the recruitment and orientation process of clinical and nonclinical staff.
   - Identify recruitment sources and techniques, including internal posting, advertising, search firms and temporary agencies
   - Recruit clinical and nonclinical staff to meet the skill mix and staff needs of the organization and its culture
   - Recruit with an emphasis on customer- and patient-focused skills
   - Define job scope and develop job descriptions
   - Develop interviewing skills, ensuring regulatory compliance
   - Establish effective selection process, including pre-employment screening, background, criminal and reference checks

2 Manage the retention of clinical and nonclinical staff.
   - Manage employee motivation and teamwork to obtain high performance
   - Ensure a healthy workplace environment, including conflict resolution process and grievance procedure
   - Analyze employee turnover and develop a strategy for improvement
   - Implement an employee satisfaction survey to measure employee engagement and to create opportunities to enhance the workplace
   - Provide access to an employee assistance program
   - Ensure accurate record-keeping for personnel records
   - Understand labor relations

3 Develop and monitor an effective staffing strategy.
   - Identify and analyze staffing needs and expectations
   - Identify the various roles staff and physicians play in a group practice
   - Establish job classification systems, including position analysis, job descriptions and working conditions
   - Ensure the appropriate number of clinical and nonclinical staff with the correct mix of skills
   - Analyze the impact of work space on staffing levels
   - Use and benchmark data for effective staffing

4 Develop, implement and evaluate performance management programs for clinical and nonclinical staff.
   - Implement performance management review system, including performance standards, professional development plans, goal-setting, schedule for periodic reviews and evaluation tools
   - Establish policies and procedures for job promotions
   - Ensure an effective process to manage performance and behavior
   - Maintain documentation and personnel records
   - Implement policies and procedures for terminating employees
5 Develop and implement staff compensation and benefit plans
   › Use market data to develop and monitor a wage and salary strategy
   › Ensure effective compensation and benefit administration
   › Evaluate types of benefit plans, including defined benefits, defined contribution, 401(k), 403(b), self-directed, employer-directed and profit sharing plans
   › Evaluate insurance, retirement and severance benefits
   › Ensure confidentiality of compensation data
   › Oversee compensation for clinical staff — refer to the Organizational Governance domain, Task 5

6 Provide systems, processes and structure for administrative and clinical training for medical providers, employees and students.
   › Foster a culture of learning and professional development
   › Oversee training, including orientation, management, technical skills, career development, certification and cross-training
   › Implement effective training programs that include on-the-job training processes, continuing education and professional development activities
   › Understand adult learning styles and delivery methods, including computer-based training, distance learning and classroom teaching
   › Establish policies and procedures for training, including time off for training, paid attendance, and continuing education requirements of professional and licensed staff

7 Establish systems and processes for awareness, education and compliance with employment laws and regulatory standards.
   › Maintain an updated employee handbook of human resource policies and procedures
   › Ensure staff education and training
   › Ensure compliance with employment laws, including but not limited to:
     • Department of Labor
     • Fair Labor Standards Act (FLSA)
     • Americans with Disabilities Act (ADA)
     • Family and Medical Leave Act (FMLA)
     • Equal Employment Opportunity Commission (EEOC)
     • Equal Pay Act
     • Civil Rights Act/Title VII
     • Age Discrimination in Employment Act
     • Affirmative Action
     • Employee Retirement Income Security Act (ERISA)
     • Workers’ compensation
     • Health Insurance Portability and Accountability Act (HIPAA)
     • Consolidated Omnibus Budget Reconciliation Act (COBRA)
     • Occupational Safety and Health Administration (OSHA)
     • National Labor Relations Act (NLRA)

8 Provide personal commitment to enhance knowledge, skills and abilities in healthcare administration.
   › Develop management and leadership skills to enhance performance and effectiveness
   › Engage in continuous learning to acquire advanced professional knowledge
   › Demonstrate and foster ethical standards, behavior and decision-making
   › Develop interpersonal skills and self-awareness
   › Develop effective communication skills including written communication and presentation skills
   › Develop effective stress management and time management skills
   › Display self-confidence and personal integrity

RECOMMENDED RESOURCES:  For current Human Resource Management articles, tools, resources and education programs visit mgma.com/BOKHumanResourceManagement.
We live in an electronic world and you oversee countless pieces of information. How will you manage evolving technologies, practice management systems, electronic health records and compliance? In a medical practice, robust information systems and strong information management capabilities are essential strategic resources.

Information Management

1 Develop and maintain appropriate internal communication pathways for clinical and nonclinical staff.
   - Establish communication system for patients to reach physicians and support staff
   - Establish communication system for clinical and nonclinical staff to communicate among themselves and with other healthcare providers and organizations, and to respond to patient requests
   - Ensure good communication pathways through careful planning, selection of appropriate communication channel and a consistent professional message
   - Oversee meeting management, including facilitation skills, agendas, decision-making processes and record-keeping
   - Foster ongoing development of effective interpersonal communication skills
   - Understand the interplay and options for internal and external communication systems and channels, including telecommunications, answering service, voice mail, fax, Internet, Web sites, e-mail, cellphones, pagers and mail services

2 Develop a technology plan that establishes the criteria for selection and implementation of information technology, including computer systems, Internet strategies and telecommunications.
   - Develop an effective technology plan and budget to support business needs and organizational goals, including an information system needs assessment
   - Understand types of information technology systems and applications used in a medical practice, including practice management systems, accounting and billing systems, electronic communication, EHRs, prescription management and disease management
   - Ensure appropriate information technology selection, procurement and installation, including request for proposals, a selection committee, physician buy-in, vendor relationships, contract negotiation and technical support
   - Ensure effective technology implementation, including installation, training, work flow redesign, process integration, reporting and ongoing support
   - Ensure maintenance of technology systems, equipment and services, including personal computers, networking, telecommunications, Web portals, application systems, software and technical support
   - Ensure training and support for clinical and nonclinical staff
3 Plan and design a technology security process to protect patient and practice data systems.
   - Ensure effective security processes and standards for technology systems and applications as well as current technological threats
   - Ensure information integrity, security and confidentiality according to the Health Insurance Portability and Accountability Act (HIPAA)
   - Oversee database management and maintenance
   - Develop a technology disaster management plan
   - Establish and implement security audit procedures for all technology systems
   - Develop policies to address employees’ personal use of the practice’s technology
   - Develop policies to prevent the theft or loss of technology equipment, including items which contain employee or patient data

4 Manage medical information systems including medical records, medication administration and healthcare related document storage.
   - Develop and maintain policies for release, update and maintenance of confidential information, in accordance with Health Insurance Portability and Accountability Act (HIPAA)
   - Establish policies for document and electronic record storage, retrieval and destruction
   - Establish requirements and processes to ensure all technological systems have fault-tolerance in accordance with accepted standards for continuous availability
   - Establish policies and procedures that adhere to regulatory requirements for the prescribing, transmission and monitoring of patient medications
   - Ensure security of protected health information (PHI)

5 Develop and implement processes to comply with mandated reports of specified patient issues to regulatory agencies.
   - Understand reporting requirements for medical conditions as established by state and federal department of health
   - Gain knowledge of disease, vaccine and other registries that require physician reporting
   - Ensure compliance with federal and state requirements for biohazard or epidemic response requirements

“The ACMPE certification program is a good example of how to ensure that our professionals possess basic competencies in a variety of areas.”

— Elaine Bertles, director of clinical services, Watson Clinic LLP, Lakeland, Fla.
Effective governance is essential to a successful medical practice. How do you ensure effective governance and leadership through policies, long-term strategies and the strategic direction of the organization?

Organizational Governance

1. Facilitate the establishment and monitoring of the appropriate corporate legal structure for the organization.
   - Understand types of legal structures, including sole proprietorship, professional corporation, limited liability partnership, limited liability company and business corporation
   - Recognize liability and taxation issues related to the legal structure
   - Maintain legal compliance with corporate structure, including tax law, physician self-referral (Stark law), anti-kickback law, False Claims Act and antitrust laws
   - Understand the impact of the legal structure on the governance system and culture of the organization
   - Use outsourced expertise of an attorney
   - Develop shareholder agreements and physician employment contracts
   - Understand the impact of independent practice associations (IPAs), hospitals and ancillary providers

2. Facilitate organizational governance structure and maintain proper corporate record-keeping of strategic decisions.
   - Support the governing body in the development of a committee structure to meet the needs of the organization
   - Understand types of committees within a governance structure, including finance, personnel, quality review, research, recruiting, performance and ad hoc
   - Document the roles and responsibilities of the board of directors and committees
   - Understand board composition and procedural rules
   - Maintain adherence to corporate bylaws and review annually
   - Provide orientation and ongoing training for board and committee members
   - Ensure record-keeping and record retention
   - Maintain organizational history
   - Participate in board/committee meeting management and board evaluation
   - Ensure effective succession planning

3. Lead the integration of the corporate mission statement into all aspects of the organization's culture.
   - Effectively communicate the organization's mission, vision and values to influence the strategic direction
   - Provide leadership, innovative thinking and change management
   - Understand organizational culture, including patterns of behavior, shared values, traditions, politics, power and group interaction
   - Uphold and advocate ethical standards, behavior and decision-making
   - Foster a culture of trust and respect
   - Manage the intricate interrelationships of the organization, staff and stakeholders
4 **Lead development of the organization’s strategic plan and its implementation.**
   - Understand components of a strategic plan, including mission, vision, values, goals and objectives
   - Conduct SWOT (strengths, weaknesses, opportunities and threats) analysis
   - Facilitate group self-assessment and stakeholder needs assessment
   - Understand market trends
   - Facilitate board monitoring and review
   - Facilitate board retreat and meeting management

5 **Establish, communicate, implement and monitor production and compensation standards for physician and midlevel professional staff.**
   - Ensure linkage between the compensation plan and the organization’s mission, goals and culture
   - Implement an effective allocation system of revenues and expenses, serving as a performance, incentive and feedback system for physicians
   - Understand components of an effective compensation system, including practice and physician goals, rewarding productivity and clarifying physician responsibility and accountability
   - Recognize compensation plan considerations, including practice size, practice setting, capitation and on-call obligations
   - Understand types of compensation plans, including individualistic models, team-oriented models and base salary plus incentive
   - Understand revenue allocation methods, including actual collections, gross or net charges, work RVUs and hybrid measures
   - Understand expense allocation methods, including cost accounting and modified cost accounting
   - Understand practice buy-in, buy-out and transition arrangements
   - Ensure regulatory compliance, including Stark and anti-kickback laws

6 **Implement and/or support organization leadership management of clinical staff conduct and performance expectations or programs.**
   - Document professional standards of conduct and expectations
   - Establish professional standards violation policy for physicians
   - Effectively communicate and clarify performance expectations
   - Support organization leadership, the governing body or a professional standards committee, regarding conflicts of interest, performance issues and disruptive behavior

7 **Foster the growth and development of physician leaders as knowledgeable, participative stakeholders.**
   - Work effectively with the leadership to foster a team culture
   - Ensure effective communication between physicians and administrative staff
   - Foster the development and growth of a physician/administrator leadership team
   - Communicate, educate and facilitate physician understanding of good business standards and financial practices
   - Facilitate conflict resolution
   - Demonstrate professional integrity

8 **Encourage and lead participation in advocacy endeavors at local, state and national levels.**
   - Understand how social, political and legal issues affect access, cost and quality of healthcare
   - Participate in local, state and national advocacy efforts affecting healthcare management
   - Educate staff on advocacy issues
   - Encourage and participate in community and civic activities

**RECOMMENDED RESOURCES:**
For current Organizational Governance articles, tools, resources and education programs visit mgma.com/BOKOrganizationalGovernance.
A critical component of medical practice management is the effective and efficient processes surrounding the patient encounter. How do you ensure that patients receive the best possible care, focus on patient safety and strive for efficient operations?

## Patient Care Systems

1. **Establish and monitor business processes to ensure effective and efficient clinical operations.**
   - Ensure effective operations to ensure clinical quality-of-care standards
   - Understand and monitor patient outcomes
   - Gain knowledge of emerging models for healthcare delivery
   - Ensure effective nurse triage systems
   - Understand principles of clinical trials research

2. **Provide relevant and accurate resources to enhance patients’ knowledge, understanding and participation in their medical care.**
   - Establish patient communication procedures, including appointment confirmations, follow-up, notifications and financial counseling
   - Facilitate patient educational support and materials
   - Establish procedures for informed consent and disclosure of unanticipated outcomes
   - Ensure documentation and communication of the patient’s treatment plan
   - Oversee prescription and refill management
   - Establish policies and procedures for termination of care and the patient relationship

3. **Develop and implement a referral management process.**
   - Understand the referral process and plan requirements
   - Enhance referrals in and out of the practice
   - Establish administrative protocols for follow-up and reporting
   - Develop and foster good relationships with referral physicians

4. **Design efficient patient flow patterns to maximize physician schedules.**
   - Establish an effective patient flow process, including registration, appointment scheduling, patient arrival and check-in, encounter management, and patient checkout
   - Manage practice’s daily flow, including emergencies, cancellations and no-shows
   - Understand scheduling methodologies and systems for physician maximization
   - Ensure effective scheduling of clinical and nonclinical staff
   - Establish emergency call procedures
5 Manage front office operations to maximize patient satisfaction, collection of payments and customer service efforts.

- Establish call center processes and procedures
- Establish pre-visit registration process
- Ensure effective patient check-in
- Oversee billing and collections
- Promote patient-focused customer service
- Ensure confidentiality and compliance with the Health Insurance Portability and Accountability Act (HIPAA)

6 Implement a plan to control pharmaceutical supplies.

- Understand types of pharmaceuticals, including vaccines, injectable medications, narcotics and samples of prescription medications
- Establish procedures for security, storage and access of pharmaceutical supplies
- Establish an inventory system, including rotation of stock, tracking of utilization and disposal
- Ensure regulatory compliance of pharmaceutical supplies
- Effectively manage relationships with pharmaceutical sales representatives

“For manager or executive openings, we always pay particular attention to candidates who are board certified or Fellows in ACMPE. Certification indicates broad and thorough knowledge of practice management — and that can make a real difference to our business.”

—Frank Ford III, FACMPE, vice president, physician services, Mission Hospital, Asheville, N.C.

RECOMMENDED RESOURCES:

For current Patient Care Systems articles, tools, resources and education programs visit mgma.com/BOKPatientCareSystems.
For your practice to thrive, quality management programs must be developed for both patients and staff. How will you best implement those programs? How will you ensure the effective development and implementation of continuous process improvement?

Quality Management

1. **Design and implement a quality management system that leads to the improvement of healthcare delivery and ensures patient safety.**
   - Engage clinical and nonclinical staff to apply quality management approaches to address and ensure safety for patients and staff as well as improve business and clinical operations
   - Understand quality management approaches and philosophies, including Total Quality Management, Six Sigma and Lean Thinking
   - Apply quality management tools such as process maps, run charts, Pareto diagrams, flowcharts, affinity diagrams and decision matrices
   - Understand the cost of quality, including internal failure costs, external failure costs, appraisal costs and prevention costs
   - Establish continuous process improvement review and practice assessment, including coding documentation, risk assessments, chart audits and auditing regulatory compliance

2. **Monitor the peer review process for clinical staff.**
   - Understand malpractice insurance carriers’ requirements for reporting, researching and defending claims
   - Establish and oversee protocols and processes for managing adverse events
   - Support physician leadership in the design and implementation of an effective peer review process

3. **Develop and oversee patient satisfaction and customer service programs.**
   - Understand and select an appropriate survey instrument to measure patient satisfaction
   - Design and implement patient satisfaction survey, analyze results and implement improvements to operations and customer service
   - Implement customer service training for staff
   - Foster a customer service focus and culture

4. **Identify, develop and maintain benchmarks for establishing practice performance standards.**
   - Implement a data collection strategy and plan, identifying meaningful measurements to benchmark
   - Develop effective benchmarking reports, such as dashboards and scorecards
   - Identify key metrics for financial growth, customer service, quality and innovation
   - Identify appropriate internal and external benchmark data to guide strategy performance
5 Create internal processes and systems to participate in pay-for-performance programs to enhance healthcare quality.

- Develop a process for capturing clinical data needed for reporting
- Measure effectiveness and value of participating in pay-for-performance programs
- Engage physicians in establishing clinical pathways and clinical protocols
- Engage physicians in participating in pay-for-performance programs
- Understand third-party quality measurement requirements such as the Health Plan Employer Data and Information Set (HEDIS), the National Committee for Quality Assurance (NCQA) and the Physician Quality Reporting Initiative (PQRI)

6 Develop and monitor a program for staff, business and equipment credentialing and licensure.

- Implement a process for physician enrollment in health plans for hospital privileges and to maintain medical licenses
- Ensure regulatory compliance with licensing and credentialing requirements
- Ensure the organization meets accreditation requirements for organizations and facilities, including the Joint Commission on Accreditation of Healthcare Organizations (JCAHO) and the Accreditation Association for Ambulatory Health Care (AAAHC)
- Ensure compliance with requirements for clinical laboratory services, i.e., Clinical Laboratory Improvement Act (CLIA)

“Obtaining the CMPE designation is essential for practice managers to elevate their credibility and our profession.”

— Valerie L. Johnson, CMPE, business officer/administrator, Health Center Montgomery, University of Alabama-Birmingham, Montgomery, Ala.

Recommended Resources:

For current Quality Management articles, tools, resources and education programs visit mgma.com/BOKQualityManagement.
Risk management is essential to protect the assets of the organization. How do you ensure compliance with all regulatory bodies and protect the practice from medical malpractice and adverse legal events?

1. **Develop and implement a risk management plan to ensure a safe environment for patients, staff and visitors.**
   - Understand risk management process components, including risk identification, risk analysis, loss control alternatives to manage potential risks, and monitoring risk control techniques
   - Develop a risk management plan including policies on blood-borne pathogens, emergency response, respiratory safety, fire safety, personal protective equipment, material safety data sheets and right-to-know for hazard communication materials
   - Periodically monitor new issues relating to risk management as they arise and incorporate into the risk management plan
   - Conduct regular and ongoing risk exposure monitoring
   - Ensure compliance with legal requirements of record-keeping, including retention, storage, retrieval and destruction
   - Ensure staff are properly trained in all aspects of risk and safety, including infection control, environmental hazards and medication errors

2. **Develop and implement policies and procedures to manage the impact of adverse legal events.**
   - Assess and procure insurance coverage, including professional liability, medical malpractice liability, general liability, property and casualty, and directors and officers liability
   - Understand and identify possible adverse legal events
   - Understand personal impact of legal events on physicians and the organization
   - Investigate all grievances, claims and complaints against the organization, assessing legal ramifications
   - Use and develop effective relationships with insurance brokers and legal counsel

3. **Establish a plan for disaster response and recovery.**
   - Coordinate disaster preparedness, including planning, implementation and recovery
   - Establish emergency and evacuation procedures
   - Understand and identify the organization’s vulnerabilities to various type of disasters and catastrophic events
   - Develop an effective disaster recovery plan to ensure business continuation
4 **Develop and implement a compliance program for federal and state laws and regulations.**

- Understand the components of a compliance program, including standards of conduct, designation of a compliance officer, effective training, effective lines of communication, auditing and monitoring, disciplinary guidelines and corrective action initiatives
- Conduct periodic compliance audits
- Ensure regulatory compliance, including but not limited to:
  - Department of Health and Human Services (HHS), Office of Inspector General (OIG)
  - Physician Self Referral – Stark law, anti-kickback law and antitrust
  - Centers for Medicare & Medicaid Services (CMS)
  - Health Insurance Portability and Accountability Act (HIPAA)
  - Occupational Safety and Health Administration (OSHA)
  - Clinical Laboratory Improvement Act (CLIA)
  - Centers for Disease Control and Prevention (CDC)
  - Employment laws and regulations — refer to the Human Resource Management domain, Task 7

“Early in my career, I was ‘learning on the fly’ until I heard about MGMA and ACMPE from a colleague. The board certification process gave me a much clearer picture of how all areas of practice management are connected and the tools I need to really move my practice forward.”

— Ruth Lander, FACMPE, practice administrator, Columbus Oncology Associates Inc., Columbus, Ohio

**RECOMMENDED RESOURCES:**
For current Risk Management articles, tools, resources and education programs visit mgma.com/BOKRiskManagement.
Your pathway to ACMPE board certification and Fellowship

One of the best career decisions you can make as a medical practice management professional is to earn board certification and Fellowship through the American College of Medical Practice Executives (ACMPE).

The Certified Medical Practice Executive (CMPE) and Fellow in the ACMPE (FACMPE) designations command the highest levels of respect and recognition in your field.

**Becoming a Certified Medical Practice Executive (CMPE)**

ACMPE uses the Body of Knowledge for Medical Practice Management as the foundation for assessments, examinations and other resources for the board certification program. The board certification process requires you to:

- Enter the certification program
- Meet eligibility requirements
- Pass a 175-item, multiple-choice objective exam that measures your understanding of medical practice management principles and practices
- Pass a written essay exam that gauges your in-depth knowledge of medical practice management, problem-solving and decision-making skills as well as your ability to communicate effectively in writing
- Earn and maintain a minimum of 50 continuing education hours

Visit mgma.com/certification for more information.

**Becoming a Fellow in the ACMPE (FACMPE)**

The FACMPE designation is the highest distinction in medical practice management. It demonstrates that you have made significant contributions to your career and your profession. To advance to Fellow status, individuals will need to:

- Complete the requirements to earn the Certified Medical Practice Executive (CMPE) designation
- Enter the Fellowship program
- Write a professional paper or case studies
- Earn and maintain continuing education hours

Visit mgma.com/fellowship for more information.

› Take the Personal Inventory self-evaluation:
  Assess your current skills and knowledge in the profession at mgma.com/inventory.

Get more information and resources online:
Visit mgma.com/bok to view the most up-to-date resources, tools, recommended books, seminars and educational opportunities to support your professional development and practice improvement.
Preparing for the certification exams

The Body of Knowledge is the outline for the ACMPE objective and essay examinations. It is designed to help you prepare for the exams by identifying the specific content that may be tested. The objective exam is designed with the percentage emphasis presented on this page for each of the eight knowledge domains. Additionally, the four professional competencies are essential to performing each knowledge domain successfully: professionalism, leadership, communication skills and critical thinking skills. Identifying and defining those competencies are part of the exams.

TIPS:

› Are you ready to realize your professional development goals and become certified? Take the first step and assess your knowledge and skills with the Personal Inventory — a free, online tool at mgma.com/inventory.

› Identify strengths and weaknesses with the in-depth, member-recommended Knowledge Assessment. Find out more at mgma.com/assessment.

› Prepare for the certification exam by purchasing the Certification Exam Workbook at mgma.com/workbook.

› Find the most current information about certification and Fellowship at mgma.com/acmpe.
Thank you to the ACMPE-member volunteers for their expertise and dedication to the Body of Knowledge update project. These individuals served as subject matter experts to address the evolving roles and skills required for a medical practice executive.

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The Body of Knowledge for Medical Practice Management is the most valid and reliable resource available in the field. Developed by ACMPE, it is based on an extensive study of group practice management professionals that identified the current knowledge and skills necessary for competent performance.

The American College of Medical Practice Executives (ACMPE) is the standard-setting and certification body of the Medical Group Management Association (MGMA).