

## Academic Status

**Academic:** An organization whose majority owner is a university, or their organization type is a medical school or university hospital.

**Non-Academic:** An organization whose majority owner is not a university, and their organization type is not a medical school or a university hospital.

## Accountable Care Organization (ACO)

### *PRO REPORT BUILDER ONLY*

A group of coordinated health care providers who form a healthcare organization characterized by a payment and care delivery model that seeks to tie provider reimbursements to quality metrics and reductions in the total cost of care for their population of patients. The ACO is accountable to patients and the third-party payer for the quality, appropriateness, and efficiency of the care provided.

## Advanced Practice Provider (APP)

Specially trained and licensed providers who can provide medical care and billable services. Examples of advanced practice providers include audiologists, certified registered nurse anesthetists (CRNAs), dietitians/nutritionists, midwives, nurse practitioners, occupational therapists, optometrists, physical therapists, physician assistants, psychologists, and surgeon's assistants.

- APPs are also known as NPPs, physician extenders and/or mid-levels.

## American College of Medical Practice Executives (ACMPE) Status

The ACMPE (American College of Medical Practice Executives) status held by the staff member.

- Not certified
- Certified (CMPE)
- Fellow (FACMPE)

## Bonus/Incentive – See Compensation

## Business Corporation – See Legal Organization

## Certified in Position

Whether or not the staff is certified in their position.

## Compensation

**Bonus/Incentive:** The total dollar amount of any bonus or incentive payments received by each individual. The amount listed as a bonus/incentive is included in the "Total Compensation" amount.

**Hourly Rate Compensation:** The hourly compensation rate paid to the individual. This is not an annualized number.

**Overtime Compensation:** The annual overtime compensation accrual, this amount is included in the total annual compensation amount.

**Retirement Benefits:** All employer contributions to retirement plans including defined benefit and contribution plans, 401(k), 403(b), and Keogh Plans, and any non-qualified funded retirement plan.

### **Not included:**

- Employer contributions to social security mandated by the Federal Insurance Contributions Act (FICA);
- Voluntary employee contributions that are an allocation of salary to a 401(k), 403(b), or Keogh Plan; or
- The dollar value of any other fringe benefits paid by the practice, such as life and health insurance or automobile allowances.

**Retirement Benefits as a Percent of Total Compensation <PRO REPORT BUILDER ONLY>:** All employer contributions to retirement plans including defined benefit and contribution plans, 401(k), 403(b), and Keogh Plans, and any non-qualified funded retirement plan divided by the total compensation amount paid annually.

### **Not included:**

- Employer contributions to social security mandated by the Federal Insurance Contributions Act (FICA);
- Voluntary employee contributions that are an allocation of salary to a 401(k), 403(b), or Keogh Plan; or
- The dollar value of any other fringe benefits paid by the practice, such as life and health insurance or automobile allowances.

# 2021 MGMA DataDive Management and Staff Compensation Glossary

**Total Compensation:** The amount reported as direct compensation on a W2, 1099, or K1 (for partnerships) plus all voluntary salary reductions such as 401(k), 403(b), Section 125 Tax Savings Plan, and Medical Savings Plan. The amount includes salary, bonus and/or incentive payments, research stipends, honoraria, and distribution of profits. However, it does not include the dollar value of expense reimbursements; fringe benefits paid by the medical practice such as retirement plan contributions; life and health insurance; automobile allowances; or any employer contributions to a 401(k), 403(b), or Keogh Plan.

- For C corporations (under United States federal income tax law, this refers to any corporation that is taxed separately from its owners), the dollar amount reported as direct compensation in Box 5 (Medicare wages and tips) from the individual's W-2.

**Included:**

- Total Medicare wages — this includes on-call compensation;
- On-call compensation — included in total Medicare wages;
- 401K;
- Life insurance; and
- Any other pre-taxed deductions (Employee contributions).

**Not included:**

- Expense reimbursements;
- Fringe benefits paid by the medical practice;
- Flex spending accounts (FSA);
- Health insurance; or
- Employer contributions.

- For partnerships (or LLCs that file as a partnership) the dollar amount reported as direct compensation in Box 1 plus Box 4 minus Box 12 minus Box 13 from the individual's K-1 form 1065.

**Included:**

- In box 13: Codes A through W (this includes 401K)

- For S corporations (or LLCs that file as an S corporation) the dollar amount reported as direct compensation in Box 5 (Medicare wages and tips) from the individual's W-2 PLUS Box 1 minus Box 11 minus Box 12 from the individual's K-1 form 1120S (combine amounts from both forms).

**Included:**

- In box 12: Codes A through S (this includes 401K)

## Compensation Method

The compensation plan/financial funds flow model that best represents the compensation plan for the individual.

- Hourly
- Salary Only (No Bonus)
- Base Salary + Discretionary Bonus

## Continuing Education Amount Offered (in Dollars)

**PRO REPORT BUILDER ONLY**

The total dollar amount allocated to each individual for continuing education (CE).

## Demographic Classification

**Metropolitan Area (50,000 or More):** The county in which the practice is located is defined as a metropolitan (metro) county by the Office of Management and Budget (OMB), based on recent Census Bureau data.

**Nonmetropolitan Area (49,999 or Fewer):** The county in which the practice is located is defined as a nonmetropolitan (nonmetro) county by the Office of Management and Budget (OMB), based on recent Census Bureau data.

## Demographic Classification (Expanded)

### *PRO REPORT BUILDER ONLY*

**Metro – Counties in metro areas of fewer than 250,000 population:** The county in which the practice is located is a Census Bureau defined urbanized area with a population less than 250,000.

**Metro – Counties in metro areas of 250,000 to 1 million population:** The county in which the practice is located is a Census Bureau defined urbanized area with a population of 250,001 to 1,000,000.

**Metro – Counties in metro areas of 1 million population or more:** The county in which the practice is located is a Census Bureau defined urbanized area with a population of 1,000,001 or more.

**Nonmetro - Completely rural or less than 2,500 urban population:** The county in which the practice is located is referred to as “rural.” It may or may not be adjacent to a metro area and has a population less than 2,500.

**Nonmetro – Urban population of 2,500 to 19,999:** The county in which the practice is located is referred to as “rural.” It may or may not be adjacent to a metro area and has a population between 2,500 and 19,999.

**Nonmetro - Urban population of 20,000 or more:** The county in which the practice is located is referred to as “rural.” It may or may not be adjacent to a metro area and has a population of 20,000 or more.

## Employment Status

Whether the employee was actively employed, newly hired or no longer employed. If the individual was employed the entire fiscal year, they were actively employed. If the individual was newly hired by the practice during the reported fiscal year, their FTE was adjusted to be reflective of the hire date and is not annualized. If the individual left the practice for any reason during the fiscal year, the FTE was adjusted to be reflective of months worked and their compensation and hourly rate would not be annualized.

## Federally Qualified Health Center (FQHC)

### *PRO REPORT BUILDER ONLY*

A reimbursement designation that refers to several health programs funded under Section 330 of the Public Health Service Act of the US Federal Government. These 330 grantees in the Health Center Program include:

- Community Health Centers which serve a variety of underserved populations and areas;
- Migrant Health Centers which serve migrant and seasonal agricultural workers;
- Health Care for the Homeless Programs which reach out to homeless individuals and families and provide primary and preventive care and substance abuse services; and
- Public Housing Primary Care Programs that serve residents of public housing and are located in or adjacent to the communities they serve.

FQHCs are community-based organizations that provide comprehensive primary and preventive health, oral, and mental health/substance abuse services to persons in all stages of the life cycle, regardless of their ability to pay.

## Fiscal Year

The corporate year established by the practice for business purposes. For many practices, this is January through December of the same year. The data reported is representative of the completed fiscal year.

## Formal Education Level

The formal education level that best represents the individual.

## Full-Time Equivalent (FTE)

A measure based upon the number of actual hours worked regardless of whether it's spent in clinical or nonclinical activities. A 1.0 FTE individual works whatever number of hours the practice considers to be the minimum for a normal workweek, which could be 37.5, 40, 50 hours, or some other standard. Regardless of the number of hours worked, an individual cannot be counted as more than 1.0 FTE

## Geographic Section



### Eastern Section:

Connecticut  
 Delaware  
 District of Columbia  
 Maine  
 Maryland  
 Massachusetts  
 New Hampshire  
 New Jersey  
 New York  
 North Carolina  
 Pennsylvania  
 Rhode Island  
 Vermont  
 Virginia  
 West Virginia

### Western Section:

Alaska  
 Arizona  
 California  
 Colorado  
 Hawaii  
 Idaho  
 Montana  
 Nevada  
 New Mexico  
 Oregon  
 Utah  
 Washington  
 Wyoming

### Midwest Section:

Illinois  
 Indiana  
 Iowa  
 Michigan  
 Minnesota  
 Nebraska  
 North Dakota  
 Ohio  
 South Dakota  
 Wisconsin

### Southern Section:

Alabama  
 Arkansas  
 Florida  
 Georgia  
 Kansas  
 Kentucky  
 Louisiana  
 Mississippi  
 Missouri  
 Oklahoma  
 South Carolina  
 Tennessee  
 Texas

## Health and Human Services (HHS) Region

### PRO REPORT BUILDER ONLY

#### HHS Region 1:

Connecticut  
 Maine  
 Massachusetts  
 New Hampshire  
 Rhode Island

#### HHS Region 2:

New Jersey  
 New York

#### HHS Region 3:

Delaware  
 District of Columbia  
 Maryland  
 Pennsylvania  
 Virginia  
 West Virginia

#### HHS Region 4:

Alabama  
 Florida  
 Georgia  
 Kentucky  
 Mississippi  
 North Carolina  
 South Carolina  
 Tennessee

#### HHS Region 5:

Illinois  
 Indiana  
 Michigan  
 Minnesota  
 Ohio  
 Wisconsin

#### HHS Region 6:

Arkansas  
 Louisiana  
 New Mexico  
 Oklahoma  
 Texas

#### HHS Region 7:

Iowa  
 Kansas  
 Missouri  
 Nebraska

#### HHS Region 8:

Colorado  
 Montana  
 North Dakota  
 South Dakota  
 Utah  
 Wyoming

#### HHS Region 9:

Arizona  
 California  
 Hawaii  
 Nevada

#### HHS Region 10:

Alaska  
 Idaho  
 Oregon  
 Washington

**Hospital/IDS Owned** – See [Organization Ownership](#)

**Hourly Rate Compensation** – See [Compensation](#)

## Hours Worked per Week

*PRO REPORT BUILDER ONLY*

The actual number of hours the individual worked per week.

## Lead in Position

An individual who is considered a lead in the position, demographic in nature.

## Legal Organization

**Business Corporation:** A for-profit organization recognized by law as a business entity separate and distinct from its shareholders. Shareholders need not be licensed in the profession practiced by the corporation.

**Limited Liability Company:** A legal entity that is a hybrid between a corporation and a partnership, because it provides limited liability to owners like a corporation while passing profits and losses through to owners like a partnership.

**Not-For-Profit Corporation/Foundation:** An organization that has obtained special exemption under Section 501(c) of the Internal Revenue Service code that qualifies the organization to be exempt from federal income taxes. To qualify as a tax-exempt organization, a practice or faculty practice plan would have to provide evidence of a charitable, educational, or research purpose.

**Partnership:** An unincorporated organization where two or more individuals have agreed that they will share profits, losses, assets, and liabilities, although not necessarily on an equal basis. The partnership agreement may or may not be formalized in writing.

**Professional Corporation/Association:** A for-profit organization recognized by law as a business entity separate and distinct from its shareholders. Shareholders must be licensed in the profession practiced by the organization.

**Sole Proprietorship:** An organization with a single owner who is responsible for all profit, losses, assets, and liabilities.

**Limited Liability Company** – See [Legal Organization](#)

## Medical Records Storage System

*PRO REPORT BUILDER ONLY*

The method in which the practice stored health/medical records for the majority of patients served by the practice.

## Minor Geographic Region

*PRO REPORT BUILDER ONLY*

### **Northeast:**

Connecticut  
Maine  
Massachusetts  
New Hampshire  
Rhode Island  
Vermont

### **Southeast:**

Alabama  
Florida  
Georgia  
Mississippi  
North Carolina  
South Carolina  
Tennessee

### **Lower Midwest:**

Arkansas  
Kansas  
Louisiana  
Missouri  
Oklahoma  
Texas

### **Rocky Mountain:**

Arizona  
Colorado  
Montana  
Nevada  
New Mexico  
Utah  
Wyoming

### **North Atlantic:**

New Jersey  
New York  
Pennsylvania

### **Northwest:**

Idaho  
Oregon  
Washington

### **California, Alaska, Hawaii:**

Alaska  
California  
Hawaii

### **Eastern Midwest:**

Illinois  
Indiana  
Kentucky  
Michigan  
Ohio

### **Upper Midwest:**

Iowa  
Minnesota  
Nebraska  
North Dakota  
South Dakota  
Wisconsin

### **Mid Atlantic:**

Delaware  
District  
Maryland  
Virginia  
West Virginia

**Multispecialty** – See Practice Type

**Multispecialty with Primary and Specialty Care** – See Practice Type (expanded)

**Multispecialty with Primary Care only** – See Practice Type (expanded)

**Multispecialty with Specialty Care only** – See Practice Type (expanded)

**Not-For-Profit Corporation** – See Legal Organization

## Number of FTE Advanced Practice Providers

*PRO REPORT BUILDER ONLY*

The practice's full-time-equivalent (FTE) advanced practice provider count. For further detail on FTE or Advanced Practice Providers, see corresponding definitions.

- No advanced practice providers
- 3 or fewer
- 4 to 9
- 10 or more

## Number of FTE Physicians

The practice's full-time-equivalent (FTE) physician count. For further detail on FTE, see Full-Time Equivalent above.

- 6 or fewer
- 7 to 10
- 11 to 25
- 26 to 50
- 51 to 75
- 76 to 150
- 151 or more

## Number of FTE Physicians (expanded)

### *PRO REPORT BUILDER ONLY*

The practice's full-time-equivalent (FTE) physician count. For further detail on FTE, see Full-Time Equivalent above.

- 3 or fewer
- 4 to 6
- 7 to 10
- 11 to 25
- 26 to 50
- 51 to 75
- 76 to 150
- 151 or more

## Number of FTE Providers

### *PRO REPORT BUILDER ONLY*

The practice's full-time-equivalent (FTE) provider count. For further detail on FTE or providers, see corresponding definitions.

- 10 or fewer
- 11 to 25
- 26 to 50
- 51 to 100
- 101 to 150
- 151 or more

## Number of Support Staff

The practice's total support staff FTE including business operations staff, front office support staff, clinical support staff, ancillary support staff, and contracted support staff.

- No support staff
- 3 or fewer
- 4 to 9
- 10 or more

## Organization Ownership

### **Hospital/IDS Owned:**

- **Hospital:** A hospital is an inpatient facility that admits patients for overnight stays, incurs nursing care costs, and generates bed-day revenues.
- **Integrated Health System (IHS) or Integrated Delivery System (IDS):** A network of organizations that provide or coordinate and arrange for the provision of a continuum of health care services to consumers and is willing to be held clinically and fiscally responsible for the outcomes and the health status of the populations served. Generally consisting of hospitals, physician groups, health plans, home health agencies, hospices, skilled nursing facilities, or other provider entities. These networks may be built through "virtual" integration processes encompassing contractual arrangements and strategic alliances as well as through direct ownership.

# 2021 MGMA DataDive Management and Staff Compensation Glossary

- **Management Services Organization (MSO):** An entity organized to provide various forms of practice management and administrative support services to healthcare providers. These services may include centralized billing and collections services, management information services, and other components of the managed care infrastructure. MSOs do not actually deliver health care services. MSOs may be jointly or solely owned and sponsored by physicians, hospitals or other parties. Some MSOs also purchase assets of affiliated physicians and enter into long-term management service arrangements with a provider network. Some expand their ownership base by involving outside investors to help capitalize the development of such practice infrastructure.
- **Physician Practice Management Company (PPMC):** Publicly held or entrepreneurial directed enterprises that acquire total or partial ownership interests in physician organizations. PPMCs are a type of MSO, however their motivations, goals, strategies, and structures arising from their unequivocal ownership character – development of growth and profits for their investors, not for participating providers – differentiate them from other MSO models.

## Physician Owned:

- **Advanced Practice Providers:** Any advanced practice provider (e.g. nurse practitioners, physical therapists, etc.) duly licensed and qualified under the law of jurisdiction in which treatment is received.
- **Physician:** Any doctor of medicine (MD) or doctor of osteopathy (DO) who is duly licensed and qualified under the law of jurisdiction in which treatment is received.

## Other Majority Owner:

- **Government:** A governmental organization at the federal, state, or local level. Government funding is not a sufficient criterion. Government ownership is the key factor. An example would be a medical clinic at a federal, state, or county correctional facility.
- **Insurance Company or Health Maintenance Organization (HMO):** An insurance company that accepts responsibility for providing and delivering a predetermined set of comprehensive health maintenance and treatment services to a voluntarily enrolled population for a negotiated and fixed periodic premium. An organization that indemnifies an insured party against a specified loss in report for premiums and paid as stipulated by a contract.
- **Private Investor(s):** A company or individual that takes their own money and uses it to fund another organization. Some investors have the option to invest passively, which means they give their funding and play no further role, while others have a more significant role in the organization.
- **University or Medical School:** An institution of higher learning with teaching and research facilities comprising undergraduate, graduate and professional schools. A medical school is an institution that trains physicians and awards medical and osteopathic degrees.

## Other Majority Ownership – See Organization Ownership

## Overtime Compensation – See Compensation

## Paid Time Off (in Hours) for Continuing Education

### *PRO REPORT BUILDER ONLY*

The total amount of paid time off allocated to each individual for continuing education (CE).

## Paid Time Off (PTO) Offered (in Hours)

### *PRO REPORT BUILDER ONLY*

The amount of paid time off allocated to each staff member per year. This will only reflect practices that combine vacation and sick time.

#### Included:

- Vacation days;
- Sick leave; and
- Personal days.

#### Not included:

- Holidays;
- Short-term or long-term disability leave;
- Workers' compensation leave;
- Family and medical leave;
- Sabbatical leave; or
- Community service leave.



## Partnership – See Legal Organization

## Patient Care Revenue <ACADEMIC ONLY>

### PRO REPORT BUILDER ONLY

The revenue received by the department from patient care activities, net of all refunds, returned checks, contractual discounts and allowances, bad debts and write-offs. The sum of total fee-for service (FFS) revenue, net prepaid (capitation/sub-capitation) revenue and net other patient care/medical services revenue equals total patient care revenue.

**Net Prepaid (Capitation/Sub-Capitation) Revenue:** A sum of all capitation revenue received from Health Maintenance Organizations (HMOs), risk-sharing revenue, hospital/utilization withholds, co-payments and revenue received from a benefits coordination and/or reinsurance recovery situation minus professional and medical services purchased from outside providers.

**Net Other Patient Care/Medical Services Revenue:** A sum of all revenue received from the sale of goods and services such as durable medical equipment rental, revenue from medical service contracts with nursing homes or ambulatory care centers, hospital reimbursements for direct patient care, and revenue from providing ancillary services on a fixed fee or percentage contract that are not billed as fee-for-service.

**Total FFS Revenue:** A sum of net collections (receipts) from patients who are self-insured, or reimbursements from a third-party insurer that compensates the department (practice plan) on a fee-for-service, or discounted fee-for service basis.

## Patient Centered Medical Home (PCMH)

### PRO REPORT BUILDER ONLY

A care delivery model where patient treatment and care is coordinated through their primary care provider to ensure they receive high quality care when care is necessary. The objective is collaboration between the patient and physicians with care delivered in a way the patient can understand. PCMHs seek to improve the quality, effectiveness, and efficiency of the care delivered while focusing on meeting patient needs first.

## Physician Owned – See Organization Ownership

## Position Title Descriptions:

**NOTE:** There are no standard definitions for position titles in the industry. Our position descriptions are intended to be all encompassing. The more specific the position description, the less applicable it becomes to all participating practices and influences the amount of data reported. Please read the description and select the position title that most closely reflects the responsibilities of the employee.

### Physician Executive Positions

#### Associate/Assistant Medical Director:

- Position requires candidate to be a licensed physician;
- Time is devoted to both administrative duties and the delivery of healthcare services; and
- Typically assists the medical director in all respects, from the administration of medical care and clinical services to utilization review and medical protocol development. If there are multiple associate/assistant medical directors, the functional areas of medical administration are usually divided up among physicians with this position title.

#### Chief Medical Officer (CMO):

- Elected by the medical staff and acts as a liaison between the medical staff and administration;
- Ensures that projects and policies are completed in a timely manner;
- Principle duty is to ensure that the executive decisions are carried out and oversee that staff members follow these guidelines; and
- Required to be a licensed physician.

#### Medical Director:

- Position requires candidate to be a licensed physician;
- The senior medical administrative position within a medical practice;
- Physician's time is devoted to both administrative duties and the delivery of healthcare services;
- In larger organizations, there may be more than one medical director;
- Responsible for all activities related to the delivery of medical care and clinical services such as cost management, utilization review, quality assurance, and medical protocol development; and
- Typically oversees the activities of group physicians, including the recruiting and credentialing processes.

## **Physician CEO/President:**

- Position requires candidate to be a licensed physician;
- Usually found in larger practices or in some form of an integrated system or network, such as physician hospital organization (PHO) or management services organization (MSO);
- Since administrative duties are substantial, the delivery of healthcare services is minimal;
- Develops and monitors organizational policy with other management personnel and board of directors;
- Responsible for the overall operation of the organization, including patient care and contract relations;
- Oversees activities related to the growth and expansion of the organization;
- Plays a major role in the organization's strategic process; and
- Typically serves as the liaison between the organization, the community, and the board of directors.

## **Executive Management Positions**

### **Administrator:**

- The top advanced practice professional administrative position with less authority than a CEO;
- Maintains broad responsibilities for all administrative functions of the medical practice, including operations, marketing, finance, managed care/third party contracting, physician compensation and reimbursement, human resources, medical and business information systems, and planning and development; and
- Typically oversees management personnel with direct responsibilities for the specific functional areas of the organization.

### **Chief Department Administrator (CDA):**

- Top administrative officer of one or more clinical science departments;
- Oversees, plans, guides and evaluates the nonmedical activities of the department including full or partial direct responsibility for the operation of ambulatory services;
- Broad responsibilities within the department include development of the department budget and approval of department expenditures; and
- Responsibilities may include full or partial management of hospital functions, supervising the department administrative staff.

### **Associate/Assistant Department Administrator:**

- Generally, consults, advises, and assists the top departmental administrator in providing leadership and direction in planning and coordinating activities;
- Generally, has a limited scope of responsibility such as marketing or human resources; and
- Multiple associate/assistant administrators may assume leadership of the department in the absence of the top administrator.

### **Contracts/Grants Department Administrator:**

- Oversees the disbursement, financial reporting, and the use of all extramural funds associated with the department's clinical and basic research programs; and
- Coordinates the development and submission of grant and contract proposals to internal and external agencies.

### **Division/Section Administrator:**

- Top administrative officer of one or more divisions or sections of a clinical science department; and
- Manages the nonclinical activities of the division(s) or section(s) and typically supervises the division or section administrative staff.

### **IS Manager/Network Administrator:**

- Coordinates the activities of the IS department including determining data processing requirements, managing department networks, determining feasibility of data projects, and performing analysis of department production; and
- Maintains and upgrades hardware and software.

### **Assistant Administrator:**

- Provides assistance to the CEO and/or administrator with the management of one or more functional areas of the medical practice such as administration, managed care, human resources marketing, patient accounting, or operations;
- Has a more limited scope of responsibility than a chief operating officer (COO);
- A medical practice may have multiple assistant administrators; and
- Responsible for assisting the CEO and/or administrator in accomplishing organizational objectives.

### **Chief Compliance Officer:**

- Develops and reviews policies and procedures for the general operation of the organization to prevent improper and/or illegal conduct;
- Manages day-to-day operations of the implemented policies;
- Investigates any reported violations of policies or procedures; and
- Works with the Human Resources Department and other appropriate areas to develop effective compliance training.

**Chief Executive Officer (CEO)/Executive Director:**

- Highest advanced practice executive position in the organization;
- Develops and monitors organizational policy in conjunction with other management personnel and board of directors;
- Responsible for the overall operation of the organization, including patient care, contract relations, and activities that relate to the future growth of the organization such as strategic planning and marketing;
- Oversees a team of senior management personnel who have direct responsibility for specific functional areas of the organization; and
- Typically serves as a liaison between the organization and staff members, businesses, individuals in the community, and board of directors.

**Chief Financial Officer (CFO):**

- Develops financial policies and oversees their implementation;
- Typically monitors a variety of financial activities, including budgeting, analysis, accounting, billing, payer contracting, collections, and the preparation of tax returns;
- Usually prepares or oversees the preparation of annual reports and long-term projections to ensure that the organization's financial obligations are met;
- May obtain funds for capital development; and
- May hold a designation as a certified public accountant (CPA).

**Department Financial Officer:**

- Develops financial policies and oversees their implementation;
- Prepares short range and long-term projections to ensure that the department's financial obligations are met; and
- Develops growth plans for the department.

**Chief Information Officer (CIO):**

- The top-level contact in information systems development and solutions;
- Contributes to general business planning regarding technology;
- Accountable for directing data integrity and confidentiality of the medical practice's patient care information;
- Identifies new developments in information systems technology, and strategizes organizational modifications; and
- Requires a masters or bachelor's degree in MIS, CIS, or a related field.

**Chief Nursing/Clinical Officer (CNO):**

- Provides leadership to assure standardization of clinical care work processes through collaboration of all organization disciplines;
- Possesses current licensure as a registered nurse; and
- Responsible for the overall direction of patient care services, monitoring standards of patient care, and setting facility performance goals.

**Chief Operating Officer (COO):**

- Consults, advises, and assists the CEO and/or administrator in providing leadership and direction in planning, directing, and coordinating both patient and non-patient care activities;
- Oversees the daily operations of the medical practice and/or other affiliated healthcare organizations; and
- Responsibilities may include facilities management, business services, human resources management.

**Chief Legal Counsel:**

- Serves as chief legal advisor to the senior leadership;
- Responsible for coordination of all legal issues and ensuring compliance with state and federal rules, laws, and regulations;
- Reviews, drafts, and negotiates contracts with payers and/or providers; and
- Builds, manages, and mentors a team of legal professionals/outsourced legal resources in accordance with practice needs.

**Chief Strategy Officer:**

- Provides assistance in developing and implementing a strategic plan for the organization/company to ensure continued growth and success;
- Coaches the management team so they understand long-term profit and performance goals, and provides ongoing support and expertise to all management personnel; and
- Ensures that the organization's policies and procedures meet legal and ethical compliance with all laws and regulations.

**Human Resources Executive:**

- Recommends and establishes company policies and procedures;
- Oversees all functions of an established human resources department within an organization; and
- Develops, implements, and coordinates policies relating to all aspects of personnel administration using the organization's objectives. This includes recruitment, salary and benefits administration, EEO/AA and labor law compliance, and employee relations.

**Marketing Executive:**

- The top marketing position in an organization with a distinct marketing and sales function;
- Directs and coordinates company sales, marketing functions, and implementation or related policies and procedures that relate to the promotion of the organization;
- May oversee the communications function;
- Develops marketing policies and programs that reflect the organization's goals and objectives; and
- Oversees or conducts research designed to evaluate the organization's market position.

# 2021 MGMA DataDive Management and Staff Compensation Glossary

## **MSO Administrator/Executive Director:**

- Oversees all activities of a hospital or investor owned MSO that provides practice management services to physician practices and clinics;
- Responsibilities range from the daily operations of multiple sites to developing strategic plans;
- Monitors the marketing of MSO services to physician clients;
- Typically serves as a liaison between various organization levels, from the physicians to the governing entities of the organization such as a hospital or health system, investors in the MSO, or a board of directors; and
- Oversees the provision of management services to newly integrated practices;.

## **Patient Care Executive:**

- Responsible for the overall administration of patient services, including coordination of services with the interdisciplinary team; and
- Appropriately delegates responsibility to nursing coordinators/team leaders, social workers, chaplains, and therapists.

## **Vice President of Operations:**

- Responsible for managing operational and strategic business development;
- Ensures operational procedures are sustainable and profitable; and
- May supervise or collaborate with department managers to achieve production goals.

## **Vice President of Revenue:**

- Creates and manages the organization's strategic vision and outcome of the revenue cycle;
- Performs duties that support efficient and effective revenue cycle performance; and
- Provides leadership to revenue related departments such as billing, accounts receivable and patient registration.

## Senior Management Positions

### **Ambulatory/Clinical Services Director:**

- A clinical operations position;
- Monitors the daily operations of the organization's clinical function;
- Develops, implements, and monitors policies and procedures; and
- Monitors the activities of the advanced practice technical staff such as radiology and laboratory technicians.

### **Ancillary Services Director:**

- Formulates policies, programs and procedures related to ancillary services;
- Develops and implements programs for expansion or contraction of patient care services as necessary;
- Oversees Joint Commission on the Accreditation of Healthcare Organization (JCAHO) standards of compliance within the ancillary departments;
- May manage laboratory, radiology, transportation/stores and pharmacy supervisors;
- Coordinates with other departments in clinic activities and in developing measures of success; and
- Aligns ancillary department initiatives with the larger organization's strategic goals and mission.

### **Branch/Satellite Clinic Director:**

- Oversees the administrative and operations activities of multiple clinical practice sites;
- Develops financial policy for the clinical operation in concert with the organization's top financial officer;
- Oversees the implementation of the organization's policies and procedures, including budget management, human resources management, and compliance with state and federal regulations; and
- Supervises clinic managers and indirectly supervises clinic staff.

### **Building and Grounds Director:**

- Develops and implements policies and procedures related to the organization's physical facilities such as buildings; and
- Oversees related activities such as building maintenance, housekeeping, grounds preservation.

### **Business Services Director:**

- Directs and coordinates business office activities in an organization that has a top administrator;
- Monitors the medical billing system; and
- Oversees areas of responsibility such as third-party reimbursement, physician billing, collections, contract administration, and management reporting.

### **Clinical Research Director:**

- Analyzes and summarizes clinical data and outcomes with responsibility for research design, methodology, and data collection protocols;
- Prepares grant proposals;
- Participates in investigator meetings, seminars, and regional or national research conferences; and
- Coordinates the activities of associates and investigators to ensure compliance with protocols and overall research objectives.

### **Compliance Director:**

- Develops, plans, organizes, and administers programs to comply with applicable state and federal statutes, regulations, policies, and procedures within the organization to ensure administrative and operational objectives are met;
- Identifies operational business risk issues; and
- Develops a Corporate Compliance Plan or a Code of Conduct Handbook.

# 2021 MGMA DataDive Management and Staff Compensation Glossary

## **Development Director:**

- Directs and coordinates fundraising programs for the organization, such as the annual fund, planned (deferred) giving, foundation and corporate fundraising, direct mail and phone solicitations, grant proposals, donor research, donor recordkeeping, donor recognition, special fundraising events, etc.

## **Education and Training Director:**

- Develops and delivers education and training programs for the training needs of the organization's staff and patients;
- Evaluates programs to determine whether the training goals and objectives have been met;
- Monitors the delivery of ongoing programs; and
- Supervises training managers.

## **Finance Director:**

- Responsible for preparing financial statements and all general accounting functions;
- Develops, implements, and monitors tax compliance such as income, sales, and use and has payroll oversight;
- Responsible for internal accounting policies and procedures;
- Supervises the financial department; and
- Directs all statistical analysis and reporting including monthly operating and medical management statistics.

## **Health Plan Director:**

- In charge of all basic non-medical operations, i.e., plans operations, membership enrollment, plans marketing, claims processing/reporting, and health plan quality assurance data collection/reporting.

## **Human Resources Director:**

- Oversees all functions of an established human resources department within an organization; and
- Develops, implements, and coordinates policies relating to all aspects of personnel administration. Including recruitment, salary and benefits administration, EEO/AA and labor law compliance, and employee relations.

## **Information Systems Director:**

- Implements and monitors all activities that relate to the organization's information system, including functions such as physician practice billing, scheduling, data processing, networking, and system security;
- Oversees or resolves systems implementation and integration issues; and
- Performs programming tasks when necessary.

## **Laboratory Services Director:**

- Responsible for all activities related to the operations of a laboratory or several laboratories from the initiation and implementation of test procedures to the oversight of laboratory personnel;
- May perform and monitor testing procedures in addition to administrative duties; and
- Monitors budget activities that relate to the laboratory function.

## **Managed Care Director:**

- Initiates and maintains relationships with managed care organizations as well as physician and ancillary providers;
- Develops and directs all managed care activities of the organization including contract negotiations, product development, and capitation payment procedures; and
- May oversee risk and utilization management activities or claims administration for professional/ medical purchased services.

## **Marketing and Sales Director:**

- Develops marketing policies and programs that reflect the organization's goals and objectives;
- Oversees or conducts research designed to evaluate the organization's market position;
- Directs the implementation of policies and procedures that relate to the promotion of the organization;
- Performs administrative tasks such as department budgeting and supervises marketing/communications specialists; and
- May oversee the communications function.

## **Materials Management Director:**

- Provides overall leadership above all material managers;
- Obtains and reviews bids for vendors; and
- Performs audits to determine items needing restock and to prevent loss and damage.

## **Medical Records Director:**

- The individual in this position usually holds professional licensure in the area of medical records management;
- Responsible for medical records library such as patient records;
- Oversees all medical records personnel; and
- Monitors budget activities that relate to the medical records function.

## **Nursing Services Director:**

- Oversees all aspects of the organization's nursing practices and the nursing staff; and
- In most cases, requires certification as a registered nurse (RN).

# 2021 MGMA DataDive Management and Staff Compensation Glossary

## **Operations Director:**

- Oversees all aspects of the practice operations for a specific site(s) (often times a single location for organizations with multiple locations);
- Directs, administers, and controls the day to day operations and activities of the practice; and
- Ensures compliance with established company and regulatory guidelines and procedures within the facility.

## **Pharmacy Services Director:**

- Directs and coordinates subordinate supervisory personnel, activities, and functions of hospital pharmacy;
- Utilizes pharmacy information systems to manage inventory control;
- Ensures compliance with all state and federal legal, accreditation, and certification requirements;
- Initiates and implements quality improvement for the pharmacy department;
- Prepares and dispenses medicines, chemicals, and pharmaceutical preparations according to written orders by authorized medical practitioners; and
- Provides hospital staff with timely information relative to new drugs, policies and standards of care that relate to medication use/safety.

## **Physician Recruitment Director:**

- Researches and recruits physicians and other allied health personnel; and
- Completes the entire recruitment cycle from initial contact to contract by organizing schedules, problem resolution, spouse and children considerations, travel, hotel arrangements, meals, references, license, housing, banking, and all other general hosting of candidates.

## **Physician Relations Director:**

- Directs and oversees programs designed to foster positive relations between physicians and the hospital or healthcare facility; and
- Promotes the organization among members of the medical community in order to establish partnerships and affiliations.

## **Quality Improvement/Quality Assurance Director:**

- Develops and monitors programs designed to improve the quality of healthcare delivery such as outcome measurement; and
- Develops policies and procedures designed to measure the quantitative and qualitative aspects of healthcare delivery.

## **Radiology Services Director:**

- Responsible for all activities relating to the delivery of radiological services including the development of policies and procedures;
- Oversees radiology personnel activities;
- Monitors the quality of all film products used; and
- Monitors budget activities related to the radiology departments.

## **Reimbursement Director:**

- Oversees payment services for the practice including establishing and maintaining the practice's fee schedules and fees that relate to managed care activities;
- Conducts regular analyses of reimbursement rates; and
- Oversees coding activities.

## **Revenue Cycle Director:**

- Implements appropriate revenue management procedures to ensure the financial success and soundness of the organization; and
- Assists and/or oversees recovering patient accounts receivable.

## **Strategy/Business Planning Director:**

- Works with the senior management team to evaluate the business direction and strategy; and
- Ensures that commercial goals of the organization are met while simultaneously maintaining financial control and asset protection.

## **General Management Positions**

### **Benefits Manager:**

- Oversees all aspects of the organization's salary/wage administration program as well as the benefits program;
- Determines eligibility for the benefits program; and
- May provide assistance and information to employees with the selection of benefits and filing claims.

### **Billing Manager:**

- Plans and manages registration, patient insurance, billing and collections, and data processing to ensure accurate and efficient account collection;
- Monitors daily operating activity of department and makes adjustments as necessary; and
- Responsible for addressing collection and business office problems.

### **Branch/Satellite Clinic Manager:**

- Oversees the daily administrative and operations activities of an assigned clinic in an organization with multiple clinics;
- Prepares the clinic's annual budget and supervises clinic staff; and
- Oversees financial transactions such as purchasing of supplies.

### **Building and Grounds Manager:**

- Responsible for major building projects and facilities expansions, space planning, remodeling of current facilities, and maintenance of equipment; and
- Responsible for operation and maintenance of facility.

**Business Office Manager:**

- Responsible for directing and coordinating the overall functions of the business office;
- The top business office position in a mid-size or small organization without a director of business services;
- Exercises general supervision over business office staff; and
- Plans and directs registration, patient insurance, billing, collections, and data processing to ensure accurate patient billing and efficient account collection.

**Call Center Manager:**

- Manages service and/or call center operations to timely and effectively respond to patient needs and ensure a quality patient experience;
- Determines and develops call center operational strategies and KPIs by tracking calls, conducting needs assessments, managing compliance issues, and identifying customer service standards;
- Provide coaching, assistance, and training to call center representatives on an ongoing basis; and
- Analyzes call center data and makes recommendations to improve operations, patient experience, as well as forecast and plan.

**Clinical Department Manager:**

- Manages operation of one or more medical/surgical departments, ancillary service departments, or an ambulatory surgery facility;
- Assists with budget planning and approves department expenditures; and
- May supervise department nonmedical staff.

**Clinical Practice Manager:**

- Coordinates and prioritizes resources, including staff, space and equipment;
- Manages all aspects of the facility such as an ambulatory clinic, including building operations; and
- Develops and implements practice standards and oversees all tasks related to the financial performance of the practice, including strategic planning such as forecasting, developing projections, and providing recommendations and justifications.

**Clinic Research Manager:**

- Collects and analyzes clinical data and outcomes; and
- The top clinic research position in a mid-size or small organization without a clinical research director.

**Coding Manager:**

- Responsible for managing and coordinating the medical coding staff;
- Has expertise in ICD-9, ICD-10, and CPT coding;
- Responsible for the security and accuracy of the patient records;
- Accountable for designing, implementing and enforcing coding policies and procedures; and
- Has knowledge of reimbursement systems, regulations, and policies pertaining to documentation, coding, and billing.

**Compliance Manager:**

- Oversees all aspects of professional billing compliance;
- Responsible for adhering to all regulatory, credentialing, and licensing requirements, and for developing compliance policies and standards;
- Oversees and maintains compliance activities and identifies compliance risk areas to ensure compliance is achieved; and
- May also be responsible for managing research grants

**Credit/Collections Manager:**

- Supervises personnel involved in the mailing of collection letters and counselors who interview patients to arrange methods of payment or extension of credit;
- Interviews patients, evaluates credit history, and determines payment dates based on patient's ability to pay and clinic policy; and
- Makes decisions on which delinquent accounts to turn over to a collection agency or recommends such action.

**Front Office Manager**

- Oversees the daily functions of front office including scheduling, reception, and insurance verification/authorization;
- Trains and manages all front office staff in addition to developing and attaining performance goals and objectives;
- Maintains a strong knowledge of scheduling systems and compliance protocols; and
- May assist with billing functions, material management or other duties as needed by the practice.

**General Accounting Manager:**

- Assists the CFO or finance director with the financial responsibilities of the organization;
- Develops and oversees activities related to implementing and maintaining the integrity of the organization's financial reporting system; and
- Assists with or oversees the budgeting process.

**Human Resources Manager:**

- Assists with all aspects of human resource activities, including recruitment, employment, compensation, labor relations, benefits, training, and development; and
- Serves as a link between management and employees by handling questions, interpreting and administering contracts, and helping resolve work-related issues.

**Information Systems Manager:**

- Manages backup, security, and user help systems;
- Researches and recommends new systems and hardware;
- Oversees system and software installation and maintenance; and
- Schedules upgrades and security backups of hardware and software systems.

**Insurance Manager:**

- Responsible for supervision and coordination of all medical group patient third-party indemnity insurance and state and federal medical assistance programs (Medicare, Medicaid, etc.);
- Involved in the implementation of insurance systems with the data processing department; and
- Supervises all insurance personnel.

**Laboratory Services Manager:**

- The top laboratory position in a mid-size or small organization without a laboratory services director;
- Responsible for the activities related to the delivery of laboratory services;
- Monitors the quality of services, products, and supplies used; and
- May monitor budget activities related to the laboratory department.

**Marketing Manager:**

- Responsible for developing, implementing, and executing strategic marketing plans;
- Raise practice awareness and patient engagement through the creation of marketing campaigns;
- Analyze trends and spearhead market research efforts;
- Manages and tracks the implementation of marketing initiatives designed to increase patient volumes; and
- Provides training and support to marketing staff as needed.

**Materials Management Manager:**

- Usually found in organizations with a separate purchasing department or function;
- Oversees all activities that involve the acquisition of equipment and supplies; and
- May monitor budget activities, including the capital equipment budget.

**Medical Records Manager:**

- Oversees and coordinates all activities of the medical library from maintenance tasks to the movement of patient records;
- Oversees all medical records personnel; and
- May monitor budget activities that relate to the medical records function.

**Nursing Manager:**

- Responsible for managing, supervising, and administering the patient/nursing services in the practice;
- In most cases, requires certification as a registered nurse (RN); and
- Supervises nursing staff.

**Office Manager:**

- Manages the nonmedical activities;
- Typically found in a practice that does not have an administrator;
- The focus of this position usually rests on the daily operations of the organization; and
- May oversee some financial activities such as billing and collections.

**Operations Manager:**

- Coordinates and directs the overall operation of specific departments; and
- Coordinates between departments to ensure that the organization meets internal and external regulatory requirements.

**Patient Accounting Manager:**

- Manages the billing process and billing staff for the practice; and
- Manages insurance and other reimbursement functions.

**Radiology Services Manager:**

- The top radiology position in a mid-size or small organization without a radiology director;
- Responsible for activities related to the delivery of radiological services;
- Monitors the quality of all film products used; and
- May monitor budget activities related to the radiology departments.

**Reimbursement/Collection Manager:**

- Oversees payment and collection services for the department including establishing and maintaining the department's fee schedules and fees that relate to managed care activities;
- Conducts regular analyses of reimbursement rates;
- Negotiates out-of-network fees;
- May be responsible for the practice's central billing office; and
- Oversees coding activities.



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## **Training/Education Manager:**

- Assists in delivering education and training programs for staff members and patients;
- Helps to identify the training needs;
- Evaluates programs to determine whether the goals and objectives have been met; and
- Monitors the delivery of ongoing programs.

## **Transcription Manager:**

- Oversees all medical transcription staff;
- Assists the process of converting voice-recorded reports dictated by physician and other healthcare professionals into text format; and
- Creates procedures to ensure accuracy.

## **Utilization Review Manager:**

- Directs collections, monitoring, and assessment of data pertaining to patient services and treatment;
- Conducts audits to ensure quality patient care and appropriateness of services within contracts; and
- Evaluates aspects of patient care, such as timeliness of services, number of bed days used in a hospital, amount of prescribed medication, patient's recovery time, etc.

## Supervisors

### **Business Office Supervisor:**

- Responsible for supervising and coordinating activities of the business office;
- This position may be implemented in a multiple clinic setting; and
- Supervises assigned business office staff.

### **Clinic Supervisor:**

- Exercises supervision over assigned staff; and
- Responsible for supervising and coordinating day to day activities of the clinic.

### **EEG Lab Supervisor:**

- Responsible for the operation of the EEG (electroencephalography) lab, evoked potential lab, and all-night sleep lab; and
- Supervises, plans, and reviews the work of the technical staff and performs their duties when required.

### **EKG Lab Supervisor:**

- Responsible for the supervision of all electrocardiography (EKG) lab personnel; and
- Proficient in the use of EKG machines, Holter monitor scanners, treadmill equipment, and heart station computers.

### **Front Office Supervisor:**

- Responsible for supervising the front office;
- Maintains and coordinates the policies and procedures; and
- Responsible for training and daily activities of front office staff.

### **Housekeeping Supervisor:**

- Directs and administers the housekeeping program;
- Establishes and maintains standards, work procedures, schedules, training and supervision for the housekeeping staff; and
- Interviews, hires, and terminates housekeeping personnel.

### **Lab Section Supervisor:**

- Assigns, coordinates, supervises, and evaluates individual categories of procedures as well as the personnel assigned to a specific section in the lab.

### **Nursing Supervisor:**

- Supervises nursing staff;
- Splits time between patient care and supervision of staff; and
- Responsibilities are more limited than the nursing manager.

## Specialists

### **Accountant:**

- Performs tasks related to bookkeeping and standard accounting functions;
- Accountable for completing journal entries and reconciling balance sheet accounts; and
- Prepares statements and reports relating to assigned areas of responsibility.

### **Authorization Specialist:**

- Ensures payment for services by verifying benefits with insurance providers;
- Obtains, reviews and submits insurance authorizations and referrals prior to patient services; and
- Monitors and tracks patient authorizations.

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## **Benefits/Payroll Specialist:**

- Oversees the entire payroll system, which includes implementing and converting the payroll system for newly acquired sites;
- Recommends policies and standards that pertain to payroll activities; and
- Responsible for the accuracy of the payroll system.

## **Billing Specialist:**

- Responsible for collecting, posting and managing account payments; and
- Responsible for submitting claims and following up with insurance companies.

## **Clinical Documentation Specialist:**

- Maintains proper records keeping;
- Ensures all patient documents and records are maintained in accordance with legal guidelines;
- Works with clinical staff to obtain information for patient records; and
- Reviews accuracy, quality and completeness of clinical records.

## **Coding Specialist:**

- Maintains procedure code master file;
- Reviews reimbursement from third-party payers;
- Maintains diagnosis code master files;
- Audits, corrects patient demographic information and total charges; and
- Works to resolve coding issues and maintains fee schedules for Medicare, fee for service, health maintenance organizations.

## **Credentialing Specialist:**

- Provides support to medical credentialing functions within the appointment and evaluation process of physicians and healthcare professionals;
- Receives and reviews applications for all required legal and organization documentation; and
- Reviews privilege requests.

## **Human Resources Specialist:**

- Provides support for various human resources (HR) employee programs;
- Develops, monitors, and maintains HR documents and databases;
- Interprets labor laws and administers them accordingly; and
- Supports hiring process by placing employment ads, screening applicants, scheduling interviews and other duties as needed.

## **IT Implementation Specialist:**

- Responsible for the EHR program from implementation to daily operations;
- Manages internal EHR and IT projects;
- Acts as liaison between management and IT department to enhance workflow and meet systems requirements; and
- Duties include training, development, support, and upgrading of the EHR system.

## **Marketing/Communications Specialist:**

- In some organizations, this person may be known as the “Public Relations Manager” and may report to the top marketing and sales position;
- Represents the organization at all media and other public relations events; and
- May oversee the activities of public relations/communications staff.

## **Recruiter:**

- Works with human resources staff to develop and execute recruiting plans;
- Drives and manages the recruiting process for both hiring managers and applicants; and
- Networks through industry contacts, association memberships, trade groups, and employees.

## **Support Staff**

### **Accounting Staff:**

- Maintains general ledger and records of financial activities within the organization;
- Analyzes financial data to prepare financial reports; and
- Generates financial records and statements for management.

### **Administrative Assistant:**

- Carries out work projects assigned by the CEO/administrator relative to the total clinic operation or to specific patient services;
- Investigates procedures and operations and gathers data for preparation of statistical and operational reports and makes recommendations for revision; and
- Performs administrative duties as directed.

### **Administrative Secretary:**

- Assists members of the administrative staff by performing secretarial, clerical, and minor executive duties; and
- Answers telephone, interviews and screens office callers, makes appointments, and composes correspondence and memoranda.

**Aesthetician:**

- Performs facials, waxing, facial peels, acne treatments, laser hair removal, microdermabrasion, makeup application and skin care consultations.

**Appointment Secretary:**

- Assesses patient's appointment needs;
- Schedules, changes, cancels, or confirms appointments as appropriate;
- Schedules tests, procedures, or surgeries as requested; and
- Sends appropriate forms, questionnaires, and instructions to patients as needed.

**Athletic Trainer:**

- Provides athletic training in office or therapy environment under the direction of providers; and
- May be certified through ATC credentialing or a similar organization

**Billing Staff:**

- Responsible for duties relating to billing, collecting, payment posting, refunding and adjusting.

**Bookkeeper:**

- Maintains accounts receivable and payable;
- Maintains a general ledger;
- Sends out and prepare bills for distribution; and
- Prepares financial statements, income statements, and cost reports.

**Building Engineer/Maintenance:**

- Repairs routine to difficult electrical, plumbing, heating, and ventilating equipment problems;
- Develops and carries out the preventive maintenance program for the mechanical, electrical, steam, plumbing, heating, and air conditioning systems; and
- Monitors energy consumption to control cost and use.

**Business Office Assistant Manager:**

- Responsible for the direction of one or more major functions of the business office; and
- Is involved with difficult or unusual billing or insurance problems.

**Business Office Staff:**

- Performs routine clerical work involving an elementary degree of skill and responsibility;
- Typical duties include filing, sorting, recording, answering telephone, and typing; and
- Responds to inquiries and requests from referring facilities.

**Call Center Representative:**

- Answers incoming calls regarding appointments, authorizations, and billing, among other customer service needs; and
- May schedule appointments and triage calls as necessary.

**Cardiovascular Technologist:**

- Supports providers in treating cardiac and peripheral vascular ailments;
- Conducts invasive and non-invasive diagnostic tests of cardiovascular and pulmonary systems;
- Sets up lab for procedures and maintain cardiac catheterization supplies; and
- May be certified through an accredited cardiovascular technology program.

**Care Coordinator:**

- Cares for patients by formulating, developing and implementing individual treatment plans;
- Communicates test results and care plans to patients/families;
- Manages/coordinates referrals and interactions with specialists; and
- Maintains records of utilization activity and coordinates utilization review of managed care contracts.

**Care/Case Manager:**

- Addresses needs of the patient beyond healthcare including housing, food assistance, domestic violence, etc.; and
- Assesses, plans, facilitates and advocates for options and services to meet the individual's health needs through communication and resources.

**Cashier:**

- Collects payment and posts payment for services rendered;
- Works with billing of patients; and
- Verifies account balances.

**CAT Scan Technician:**

- Operates the computed axial tomography machine;
- Applies prescribed radiation for the purpose of obtaining diagnostic information; and
- Typically, a graduate of an accredited program for radiographers with experience in special procedure or may be certified.

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## **Certified Nursing Assistant:**

- Provides patient care by assisting patients with basic needs such as bathing, dressing, mobility, positioning, eating, grooming etc.;
- Observes patient conditions, measures and records food and liquid intake, and vital signs; and
- Assists with direct patient care under the supervision of the RN or medical professional.

## **Clinical Research Coordinator:**

- Provides direction and support for all clinical research activities including paperwork, registration, monitoring and reporting.

## **Coder:**

- Analyzes and codes surgeries, procedures and diagnoses from health records by using appropriate classification systems, standards and procedures;
- Links diagnoses with procedures and adds appropriate modifiers;
- Validates charge classification systems, standards and procedures;
- Confers with providers to assure complete, current medical records;
- Audits incomplete records; and
- May be certified by AAPC, or a similar organization

## **Collections Staff:**

- Coordinates resolution of past due accounts by arranging for payment;
- Researches, compiles, maintains and manages data related to collection efforts; and
- Contacts customers to resolve billing issues.

## **Courier:**

- Moves and distributes information, documents, and small packages; and
- Picks up and delivers letters, important business documents, or packages that need to be sent or received quickly within a local area.

## **Data Analyst:**

- Supports organization in collecting, aggregating and analyzing data and producing actionable reports;
- Develops and manages data-driven improvement projects;
- Interprets data and develops algorithms to calculate operational KPIs; and
- Automates internal and external reports and presents data findings to various levels of staff.

## **Dental Assistant:**

- Prepares and maintains treatment room, as well as dental tools and machinery;
- Performs clerical duties such as obtaining patient records, handling insurance and patient billing, and inventory; and
- May take impressions and/or x-rays, at the provider's discretion.

## **Dental Hygienist:**

- Performs direct patient care duties such as reviewing a patient's oral history, polishing teeth, removing tartar, plaque and stains, and counseling patients on oral hygiene techniques; and
- May be certified through an accredited training program.

## **DME Technician:**

- Manages the practice's durable medical equipment (DME) by organizing and tracking inventory, purchasing equipment and ensuring timely and accurate delivery;
- Prepares vehicle for deliveries by gathering stock and loading equipment;
- Schedules pick up and delivery orders with facilities, patients and/or caregivers as needed;
- Understands basic equipment operation and provides instructions to patients and/or caregivers to assure proper use and care; and
- Cleans, disinfects, inspects, and tests medical equipment.

## **Dosimetrist:**

- Has overall knowledge of radiation oncology treatment machines and equipment;
- Is familiar with the procedures commonly used in brachytherapy; and
- Can generate radiation dose distributions/calculations in collaboration with the medical physicist and radiation oncologist.

## **Echocardiographer/Echo Tech:**

- Performs high-quality ultrasound imaging of the heart; and
- May be credentialed through an organization such as the American Registry for Diagnostic Medical Sonography (ARDMS) or the Cardiovascular Credentialing International (CCI).

## **EEG Technician:**

- Operates electroencephalograph (EEG) machine for use in diagnosing brain disorders; and
- May be a graduate of a two-year technical school with an EEG Tech. program.

## **EKG Technician:**

- Records electromotive variations in action of the heart muscle on an electrocardiograph (EKG);
- Attaches electrodes to specified areas of patient's body and removes electrodes after completing test;
- Reviews recording from each electrode for clarity and for deviations from the norm; and
- Requires high school degree and may require completion in an approved training course in EKG techniques or certification.

**Endoscopy Technician:**

- Prepare and maintain procedure room and inventory;
- Assist providers or registered nurses in conducting endoscopic procedures; and
- Collects patient biopsies and specimens for examination.

**Executive Assistant:**

- Provides high-level administrative support to executive level;
- Maintains scheduling meetings and prioritizing calendar requests;
- Makes travel arrangements, prepares itineraries and expense reports;
- Manages incoming and outgoing phone calls; and
- Monitors office supply inventory.

**Financial Analyst:**

- Compiles and analyzes data to monitor trends and variances;
- Creates financial models and forecasts to assist with decision support; and
- May perform other tasks related to financial data, not restricted to elements of the revenue cycle.

**Front Desk Staff:**

- Assists patients and visitors by providing directions and information;
- Usually stationed by main entrance;
- Registers patients who do not have an appointment, and may schedule return visits;
- May take payments and also provide check-out services;
- Checks that all records needed by provider are available and notifies physician of patient's arrival; and
- Answers telephones.

**Histotechnologist:**

- Member of a laboratory team who employs histologic technology to diagnose diseases or conduct research as requested by pathologists;
- Ensures accurate completion of all histology laboratory records; and
- May be certified through the ASCP Board of Certification or a similar organization.

**Housekeeper:**

- Maintains an assigned area of the building in a clean, orderly, and attractive condition; and
- Dusts and damp mops floors, cleans window sills, blinds, furniture, fixtures, and equipment within hand reach.

**Human Resources Generalist:**

- Guides managers in recruiting and employee relations;
- Administers employee compensation, training and benefit programs;
- Processes, verifies and maintains documentation relating to HR activities such as staffing, training and performance evaluations; and
- Usually works under the direction of a human resources director or manager.

**Insurance Clerk:**

- Collects and posts payments for services rendered;
- Reviews EOBs for appropriate contractual write-offs and other adjustments to charges;
- Researches and appeals inappropriate denials; and
- Verifies patient account balances prior to preparing patient statements.

**IT Programming Staff:**

- Responsible for system analysis, program design, coding, documentation, and other programming tasks.

**IT Support Technician:**

- Responds to hardware and software requests and troubleshoots issues;
- Installs, updates, and repairs software issues on organization systems; and
- Maintains current inventory.

**Laboratory Assistant:**

- Performs routine tests in various areas of the lab using standard techniques and equipment;
- Prepares simple stains, solutions, and culture media;
- May perform simple laboratory tests such as qualitative determinations of sugar and albumin in urine;
- Keeps records of specimens held in the laboratory;
- May perform minor repairs to laboratory apparatus or clean laboratory equipment; and
- May be certified from the Board of Certified Laboratory Assistants.

**Licensed Practical Nurse:**

- Performs assigned nursing procedures for the comfort and well-being of patients;
- Takes and records patient's vital signs and collects specimens for analysis;
- Dresses wounds and administers prescribed medications and procedures utilizing a variety of medical equipment when necessary; and
- Must be state licensed.

**Mammography Technician:**

- Responsible for screening and diagnostic exams of the breast, aiding in the early detection of breast cancer; and
- May require ARRT certification.

**Managed Care Coordinator:**

- Responsible for maintaining information flow in the managed care referral process for all contracted managed care health plans.

**Massage Therapist:**

- Performs therapeutic manipulations of soft tissues and joints to control pain or promote wellness;
- May evaluate range of motion, muscle strength and propose therapy plans; and
- Must be licensed.

**Medical Assistant:**

- Prepares treatment rooms as well as sterilizes and cleans instruments;
- Assists physician with materials, instruments, procedures, and equipment during exam;
- Collects specimens and takes blood pressure, pulse, and temperature;
- Maintains inventory of supplies;
- Completes paperwork for lab tests, x-rays, and referrals; and
- May be a graduate of and certified from a technical school medical assistant program.

**Medical Interpreter:**

- Assist non-English speaking patients during patient visits to translate patient's native language;
- Uses proper medical terminology when communicating with medical staff; and
- Can be certified in a medical interpreter certificate program.

**Medical Lab Technician (MLT):**

- Conducts routine tests in clinical labs for use in the treatment and diagnosis of disease;
- Prepares sterile media for use in growing bacterial cultures;
- Keeps detailed records of all tests performed and reports lab findings to authorized personnel; and
- Graduation from a technical school either as a MLT or ASCP certification may be required.

**Medical Records Staff:**

- Files charts returned to record room and sends charts out upon request; and
- Keeps medical records in correct filing order.

**Medical Scribe:**

- Works to facilitate patient flow and ensure an accurate and complete medical record for each patient;
- Accompanies physician into the patient examination room in order to transcribe a history and physician exam; and
- Accurately documents the physician's encounter with the patient.

**Medical Secretary:**

- Performs secretarial duties utilizing knowledge of medical terminology and hospital, clinic, or laboratory procedures;
- Takes dictation in shorthand or uses transcribing machine; and
- Compiles and records medical charts, records, and correspondence.

**Medical Technologist:**

- Performs variety of microscopic, chemical, and bacterial tests to obtain data for use in diagnosis and treatment of disease;
- Performs routine and special laboratory tests in accordance with written requisition of physician;
- May perform clinical tests in any one or combination of areas of specialization in smaller labs, and may be more specialized in one area of clinical pathology in larger labs; and
- May require ASCP certification.

**MRI Technologist:**

- Operates magnetic resonance imaging equipment to produce images of the body for diagnostic purposes;
- Explains procedures to patient, positions patients and observes scans under the direction of a physician;
- Reviews and evaluates computer generated information to determine quality of images; and
- May require ARRT certification.

**Nuclear Medicine Technologist:**

- Responsible for administering radiopharmaceuticals to patients for diagnostic purposes;
- May also perform radioimmunoassay studies; and
- May require ARRT certification.

**Occupational Therapy Assistant:**

- Works under the supervision of a licensed occupational therapist to assist with a patient's treatment program;
- Helps patients with rehabilitative activities and exercises outlined in a treatment plan developed in collaboration with an occupational therapist;
- Monitors and records an individual's activities to make sure exercises are performed correctly and progress is made;
- May assist in scheduling appointments, answering the telephone, restocking or ordering depleted supplies, filling out insurance forms, or other duties as needed; and
- May be certified through an accredited occupational therapy assistant program.

**Ophthalmic Assistant:**

- Usually employee is trained in history-taking, basic skills in lensometry, and instrument maintenance; and
- May assist patients in proper insertion, removal, and care of contact lenses.

**Ophthalmic Technician:**

- Assists ophthalmologist or optometrist with patient care;
- Performs different levels of eye tests such as visual fields, tonometry, and ocular motility required by ophthalmologist;
- May assist ophthalmologist in surgery; and
- May be certified by JCAHPO (Joint Commission on Allied Health Personnel in Ophthalmology) as a COT (Certified Ophthalmic Technician).

**Optician:**

- Interpretation of prescriptions written by ophthalmologists and optometrists;
- Operates manual lensometer and other tools to achieve proper fittings for patients;
- Collection of patient eye measurements;
- Educates patients on their corrective lens options and care; and
- Manage inventory of frames and contact lenses to ensure optimum customer satisfaction and product variety.

**Orthopedic/Cast Technician:**

- Assists physicians and nursing personnel with orthopedic casting procedures to include the application and removal of a variety of casts and splints; and
- May be certified by the National Board for Certification of Orthopaedic Technologists (NBCOT).

**Paramedic:**

- Responds to calls for emergency assistance;
- Transports patients to other medical facilities; and
- Requires certification.

**Patient Accounts Representative:**

- Interviews and assists patients;
- Works with patient and patient's insurance carrier to determine benefits available and assist families in getting financial aid; and
- Responsible for billing, servicing, and collecting delinquent accounts receivable.

**Patient Care Assistant:**

- Takes vital signs, assists with daily living activities, oversees patients, documents changes in health or behavior, escorts patients and obtains lab specimens; and
- Generally works under supervision of a registered nurse.

**Patient Education Coordinator:**

- Responsible for determining the patient education needs of the clinic;
- Develops, implements and evaluates programs to address education needs; and
- Coordinates and supervises community healthcare needs of patients in an ambulatory setting.

**Patient Service Coordinator:**

- Performs a variety of tasks related to handling patients and paperwork;
- Maintains and processes visitor schedule; and
- Provides clerical support, patient registration and customer service (greeting, screening and transporting patients).

**Pharmacist:**

- Prepares, reviews and dispenses prescription medications to ensure accuracy, and compliance with professional, state and federal regulatory requirements;
- Educates patients on medication use, storage and side effects;
- Primarily works for pharmacies and drug stores but may be employed by hospitals and clinics to dispense medications directly to patients; and
- May collaborate with other healthcare professionals to plan, monitor, review and evaluate patient effectiveness.

**Pharmacy Technician:**

- Helps licensed pharmacists prepare prescription medications, provide customer service, and perform administrative duties within a pharmacy setting;
- Is generally responsible for receiving prescription requests, counting tablets, and labeling bottles;
- May perform administrative functions such as answering phones, stocking shelves, and operating cash registers; and
- May be certified by the Pharmacy Technician Certification Board (PTCB), National Healthcare Association (NHA), or similar organization.

**Phlebotomist:**

- Responsible for drawing blood and other body fluids for sampling;
- Assists in other assigned laboratory functions; and
- May be certified by the NHA or similar organization.

**Physical Therapist Aide:**

- Performs specific nonclinical physical therapy procedures and related tasks under the direction of a physical therapist or physical therapy assistant.

**Physical Therapy Assistant:**

- Prepares patients and equipment for therapy;
- Assists physical therapist in administering treatments;
- Maintains department in an orderly condition; and
- Requires a two-year technical degree.

**Physicist:**

- Maintains and uses equipment and lab space;
- Designs, conducts and evaluates the results of experiments, methodologies, and quality control tests;
- Communicates results to researchers, students, funders, the public, and other audiences; and
- Generally, requires significant graduate-level education.

**Polysomnographic/Sleep Technician:**

- Works to provide comprehensive evaluation and treatment of sleep disorders including in center and home sleep apnea testing, diagnostic and therapeutic interventions, comprehensive patient care and direct patient education.

**QA/QI Coordinator:**

- Assists in monitoring patient health to improve the quality of healthcare delivery;
- Provides patient outreach for specific target patient populations, especially surrounding chronic care and preventative care maintenance; and
- Works with healthcare team to improve patient health outcomes and ensure high-quality patient experiences.

**QA/UR Nurse:**

- Implements programs designed to improve the quality of healthcare delivery;
- Measures the quantitative and qualitative aspects of healthcare delivery;
- Likely to be found in larger organizations with some degree of integration with other healthcare organizations; and
- Monitors inpatient and outpatient care activities to ensure that accepted utilization management procedures are maintained.

**Radiation Therapist:**

- Responsible for administering radiation treatment to patients under the direction of a radiation oncologist; and
- May be certified by the ARRT.

**Radiology Technologist:**

- Provides technical skills involving radiology and fluoroscopy;
- Takes and may develop radiographs of various parts of the body to assist physician in the detection of foreign bodies and diagnosis of disease or injury; and
- May be certified by the ARRT.

**Receptionist:**

- Greets patients or others arriving for appointments;
- Obtains information, answers questions, and provides assistance or directions as appropriate;
- Notifies physician of patient's arrival;
- Checks to assure all records needed by physician are available;
- Answers telephones; and
- May schedule return visits and make appointments.

**Referral Coordinator:**

- Working with patients to arrange and schedule referral appointments. This can include providing patients with referrals to other care providers, managing incoming patient referrals, or both; and
- Set appointments, send reminders, and provide patients with information about referral appointments.



**Registered Nurse:**

- Renders professional nursing care for the comfort and well-being of the patients;
- Prepares equipment and assists physician during examinations and treatments;
- Administers prescribed medications, changes dressings, cleans wounds, and monitors patient's vital signs;
- Observes and maintains records on patient's care, conditions, reaction, and progress; and
- Must be state licensed and a graduate of a registered nurse program.

**Respiratory Therapist:**

- Responsible for evaluating, treating, and caring for patients with breathing or other cardiopulmonary disorders under the direction of a physician;
- May supervise respiratory therapy technicians; and
- May be certified by the National Board for Respiratory Care.

**Scheduling Staff (excluding Surgical Scheduler):**

- Responsible for scheduling appointments for patients following medical practice procedures.

**Social Worker:**

- Gathers relevant information regarding case and patient issues;
- Facilitates education, support groups and referrals;
- Maintains caseload, documentation and reevaluates patients at appropriate intervals;
- Assesses and treats patients and their families in understanding and coping with emotional and social problems; and
- Provides advocacy and resource services for the patient.

**Speech Therapist:**

- Administers and evaluates hearing, speech and language tests and results to diagnose and treat speech, language, social communication, cognitive communication and swallowing disorders in children and adults.

**Sterile Processing Technician:**

- Prepares, sterilizes and assembles laboratory and healthcare equipment used for surgeries, examinations and other medical procedures;
- Ensures safety and cleanliness of equipment, supplies and instruments; and
- Maintains records of sterilization procedures and sterilized items.

**Surgical Scheduler:**

- Responsible for scheduling surgical procedures and tests under the direction of providers and clinical staff.

**Surgical Technologist:**

- Responsible for assisting in surgical operations as part of a team under the supervision of surgeons, registered nurses, or other surgical personnel;
- Helps prepare operating room by setting up surgical instruments and equipment, sterile drapes, and sterile solutions; and
- Certification or licensure may be required dependent upon state.

**Switchboard Operator:**

- Operates a telephone switchboard to relay incoming and outgoing calls; and
- Pages personnel over the intercom system.

**Therapist/Counselor:**

- Provides counseling and/or cognitive therapy to treat emotional or mental disorders and promote mental well-being;
- May work within the context of substance abuse counseling, marriage/family counseling, or child/adolescent counseling;
- Works to develop coping strategies, provides emotional support, or assists with environmental adaptation; and
- May develop individualized treatment plans, including referral of patients and case management.

**Transcriptionist:**

- Responsible for transcribing dictated recordings made by physicians and other healthcare professionals into medical reports, correspondence, and other administrative material, which typically become part of patients' permanent files; and
- May require CMT certification.

**Triage Nurse:**

- Primarily responsible for screening and placement of patients who walk in or telephone with medical problems or questions;
- Orders medical record and takes medical history;
- Administers first aid as appropriate;
- Sets up appointment with appropriate department as necessary; and
- Requires a registered nurse degree and a state license.

**Ultrasound Technician:**

- At the direction of a qualified physician, performs a variety of procedures requiring independent judgment and initiative in the utilization of ultrasonic equipment for the diagnosis of disease in humans; and
- Must be a graduate of a formal ultrasonographer program or trained on the job by a radiologist and eligible for certification.

**Workers Comp Liaison:**

- Provides communication, paperwork, authorization and information for staff and providers on workers' compensation claim activities.

## Practice Type

**Multispecialty:** A medical practice that consists of physicians practicing in different specialties.

**Single Specialty:** A medical practice that focuses its clinical work in one specialty. The determining factor for classifying the type of specialty is the focus of clinical work and not necessarily the specialties of the physicians in the practice.

## Practice Type (expanded)

### *PRO REPORT BUILDER ONLY*

**Multispecialty:** A medical practice that consists of physicians practicing in different specialties.

- **Multispecialty with Primary and Specialty Care:** Medical practices that consist of physicians practicing in different specialties, including at least one primary care specialty listed below:
  - Family Medicine: General
  - Family Medicine: Sports Medicine
  - Family Medicine: Urgent Care
  - Family Medicine: With OB
  - Family Medicine: Without OB
  - Geriatrics
  - Internal Medicine: General
  - Pediatrics: Adolescent Medicine
  - Pediatrics: General
  - Pediatrics: Sports Medicine
  - Urgent Care
- **Multispecialty with Primary Care Only:** A medical practice that consists of physicians practicing in more than one of the primary care specialties listed above or one of the specialties below:
  - Obstetrics/gynecology
  - Gynecology (only)
  - Obstetrics (only)
- **Multispecialty with Specialty Care Only:** A medical practice that consists of physicians practicing in different specialties, none of which are the primary care specialties listed above.

**Single Specialty:** A medical practice that focuses its clinical work in one specialty. The determining factor for classifying the type of specialty is the focus of clinical work and not necessarily the specialties of the physicians in the practice.

## Professional Corporation/Association – See Legal Organization

## Provider

Both physician and advanced practice providers (APP) that provide medical care and billable services. For more information on advanced practice providers, please see the corresponding definition.

## Retirement Benefits – See Compensation

## Retirement Benefits as a Percent of Total Compensation – See Compensation

## Rural Health Clinic (RHC)

### *PRO REPORT BUILDER ONLY*

A clinic certified to receive special Medicare and Medicaid reimbursement. The purpose of the RHC program is to improve access to primary care in underserved rural areas. RHCs are required to use a team approach of physicians and advanced practice providers (nurse practitioners, physician assistants, and certified nurse midwives) to provide services. The clinic must be staffed at least 50% of the time with an advanced practice provider. RHCs may also provide other healthcare services, such as mental health or vision services, but reimbursement for those services may not be based on their allowable costs.

## Sick Time Offered (in Hours)

*PRO REPORT BUILDER ONLY*

The number of hours each staff member was given annually for sick time. This will only reflect practices that separate out vacation and sick time.

## Single Specialty – See Practice Type

## Sole Proprietorship – See Legal Organization

## Total Compensation – See Compensation

## Total Medical Revenue

The sum of fee-for-service collections (revenue collected from patients and third-party payers for services provided to fee-for service, discounted fee-for-service, and non-capitated Medicare/Medicaid patients), capitation payments (gross capitation revenue minus purchased services for capitation payments), and other medical activity revenues.

**Net Prepaid (Capitation/Subcapitation) Revenue:** Include all capitation revenue received from Health Maintenance Organizations (HMOs), risk-sharing revenue, hospital/utilization withholds, co-payments and revenue received from a benefits coordination and/or reinsurance recovery situation minus professional and medical services purchased from outside providers.

**Net Other Patient Care/Medical Services Revenue:** Include all revenue received from the sale of goods and services such as durable medical equipment rental, revenue from medical service contracts with nursing homes or ambulatory care centers, hospital reimbursements for direct patient care, and revenue from providing ancillary services on a fixed fee or percentage contract that are not billed as fee-for-service.

**Other Medical Revenue:** includes grants, honoraria, research contract revenues, government support payments, and educational subsidies plus the revenue from the sale of medical goods and services.

**Total Department Revenue:** all revenue received by the department from patient care activities, net of all refunds, returned checks, contractual discounts and allowances, bad debts and write-offs. The sum of total fee-for-service (FFS) revenue, net prepaid (capitation/subcapitation) revenue and net other patient care/medical services revenue equals total patient care revenue.

**Total FFS Revenue:** Include net collections (receipts) from patients who are self-insured, or reimbursements from a third-party insurer that compensates the department (practice plan) on a fee-for-service, or discounted fee-for service basis.

## Vacation Offered (in Hours)

*PRO REPORT BUILDER ONLY*

The number of hours each staff member was given annually for vacation. This will only reflect practices that separate out vacation and sick time.

**Not included:**

- Any paid time off for continuing education (CE).

## Years of Experience

The total years of experience in the individual's current reported position.