



## O\*Net Occupational Review

### Selected Criteria:

Occupation: **Medical Secretaries**

*For information about more occupations, go to <http://online.onetcenter.org/> and click "Find Occupations"*

### Occupation Description

Perform secretarial duties utilizing specific knowledge of medical terminology and hospital, clinic, or laboratory procedures. Duties include scheduling appointments, billing patients, and compiling and recording medical charts, reports, and correspondence.

### Tasks and Activities

Occupation specific tasks and the most important generalized work activities are listed for **Medical Secretaries**.

#### Occupation Specific Tasks:

- Answer telephones, and direct calls to appropriate staff.
- Arrange hospital admissions for patients.
- Compile and record medical charts, reports, and correspondence, using typewriter or personal computer.
- Complete insurance and other claim forms.
- Greet visitors, ascertain purpose of visit, and direct them to appropriate staff.
- Interview patients to complete documents, case histories, and forms such as intake and insurance forms.
- Maintain medical records, technical library and correspondence files.
- Operate office equipment such as voice mail messaging systems, and use word processing, spreadsheet, and other software applications to prepare reports, invoices, financial statements, letters, case histories and medical records.
- Perform bookkeeping duties, such as credits and collections, preparing and sending financial statements and bills, and keeping financial records.
- Perform various clerical and administrative functions, such as ordering and maintaining an inventory of supplies.
- Prepare correspondence and assist physicians or medical scientists with preparation of reports, speeches, articles and conference proceedings.
- Receive and route messages and documents such as laboratory results to appropriate staff.
- Schedule and confirm patient diagnostic appointments, surgeries and medical consultations.
- Transcribe recorded messages and practitioners' diagnoses and recommendations into patients' medical records.
- Transmit correspondence and medical records by mail, e-mail, or fax.

#### Detailed Work Activities:

- compile data for financial reports
- complete patient insurance forms
- disburse checks to satisfy accounts payable
- distribute correspondence or mail
- ensure correct grammar, punctuation, or spelling
- enter time sheet information
- evaluate importance of incoming telephone calls
- examine documents for completeness, accuracy, or conformance to standards
- fill out business or government forms
- fill out insurance forms
- fill out purchase requisitions
- greet customers, guests, visitors, or passengers
- inventory medical supplies or instruments
- maintain appointment calendar
- maintain dental or medical records
- maintain inventory of office equipment or furniture
- maintain inventory of office forms
- maintain record of organization expenses
- maintain records, reports, or files
- maintain telephone logs
- maintain travel expense accounts
- obtain information from individuals
- post medical insurance billings
- prepare billing statements
- prepare financial reports
- prepare tax reports
- process account invoices
- process medical records
- provide customer service
- reconcile or balance financial records
- route multi-line telephone calls
- take dictation
- take messages
- transcribe spoken or written information
- type document from machine transcription
- type letters or correspondence
- use accounting or bookkeeping software
- use computers to enter, access or retrieve data
- use interviewing procedures
- use oral or written communication techniques
- use secretarial procedures
- use shorthand writing procedures
- use spreadsheet software
- use word processing or desktop publishing software

I have read and discussed the above job duties as described above for a Medical Secretary/Medical Office Clerk with my Case Manager.

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Participant Signature

Date

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Case Manager Signature

Date