

TASKS PERFORMED BY MEDICAL SECRETARIES

by

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PREFACE

This study was to determine what tasks are regularly performed by medical secretaries and medical transcriptionists. The objective was to learn with what frequency these tasks are performed and what level of skill is necessary in the areas of clerical practices, medical terminology, clinical procedures, and medical transcription.

The author wishes to express her appreciation to her advisor, Dr. Lloyd Wiggins, and to Dr. Richard Tinnell for their advice and assistance during the study.

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Chapter I

INTRODUCTION

Background Information

The present medical secretarial program at Oklahoma State Tech is responsible for training the clerical student in the basic secretarial skills with additional instruction in the understanding and use of medical terminology. The program produced its first graduates in 1972, but extensive research has not been done to determine the exact duties of a medical secretary and the types of jobs available. The course content has been based on textbook material and information given by the hospitals which take part in the internship program.

In the article, "The medical Assistant in the Art of Healing," the author reports that there are some 18 different locations in which the secretary trained in medical stenography and terminology may work. The field is, therefore, broad and not necessarily confined to a doctor's office, clinic, or hospital (Gatto, 1979).

Statement of the Problem

The difference between a secretary and a medical secretary is the knowledge of terminology, anatomy, physiology, disease conditions, and the ability to put this knowledge to work. As the medical secretarial program is presently being taught, a student enrolls in basic clerical

courses for the first three terms, with medical terminology being introduced in the fourth term. The student graduates with good secretarial skills and the ability to transcribe medical dictation, which is the ideal training for a student who wishes to work as a transcriptionist in a hospital. The program, as it is presently organized, however, is relatively narrow and often difficult for many students. Because of the length of the program and the difficulty of the medical transcription, a higher than average number of students change to shorter, less demanding programs.

Need for the Study

The usual procedure has been for medical secretaries to receive training on the job from co-workers or the physicians who employed them. The trend now, however, is for doctors and hospitals to look for employees with previous training in the medical area, particularly medical terminology.

If institutions are to turn out graduates to meet the needs of the medical community, they must determine what skills will be needed and what tasks the employee will be expected to perform. This should be done before one attempts to upgrade or modify an existing program. Very little has been done to determine the basic tasks of the medical secretary in the areas of patient contact, office procedure, and medical specialization such as transcription.

The medical secretarial program at Oklahoma State Tech was based on textbook material and the advice of the medical records department of local hospitals. The danger of using textbook material as a guide for course content is that students may be trained to perform duties

that are rarely found in medical offices. Some may be outmoded while others could best be taught on the job. The result may also be a program which does not reflect the latest procedures and equipment now being used. With the rapid growth of technology, word processing equipment is being used even in the smaller medical practices. As a result, the medical secretary can no longer realistically expect to work with only a standard electric typewriter.

In order to avoid these errors, it is necessary to determine the exact duties of medical secretaries and the frequency with which they are performed.

Purpose of the Study

The purpose of the study was to determine through a survey what tasks are regularly performed by medical secretaries and what skills are necessary for success on the job.

Research Questions

The research was conducted to answer the following questions:

1. What tasks are performed regularly by medical secretaries in hospitals, clinics, and doctors' offices?
2. To what extent and in what areas is specialized medical terminology required?
3. What levels of skill are required in shorthand and typing?
4. What knowledge and skill is required in the specialization of medical transcription?

Chapter II

REVIEW OF LITERATURE

Identification of the Need

Opportunities for medical secretaries are increasing more rapidly than those in any other area of secretarial specialization (The Administrative Secretary, p. 12).

Altogether, there are over 200 different occupations that fall under the Department of Labor's category of allied health services, employing over 4 million people (Gatto, 1979, p. 7).

There is a constant increase in the volume of records being required for the medical community because of patient load, advanced technology, and government regulations. It is no longer profitable for a physician or hospital to hire prospective medical secretaries and expect to train them on the job. Webster's Medical Office Handbook (1979) states that medical secretaries perform over 50 major administrative functions alone in a physician's office. Therefore, a secretary must expect to assume responsibility for the performance of office procedures connected with the medical practice.

This practice is so technical and demanding the physician does not have the time or the training to teach the business aspects to a new employee. Also, the volume of records and reports to be transcribed in a hospital does not allow time to teach a new employee the extensive medical terminology required to become a medical transcriptionist.

There are some 18 different locations in which the secretary trained in medical stenography, medical terminology, and medical usage may work. These include the traditional settings of private medical and dental offices, clinics, and hospitals, as well as foundations, institutions, the armed services, insurance companies, group practices, public health departments, Medicare agencies, laboratories, and the fields of manufacturing, publishing, teaching, and free lancing (Gatto, 1979, p. 7).

Since the medical community has a need for employees who already possess the skills and knowledge required for these positions, a medical secretarial program has an excellent opportunity to meet this need. This can be accomplished with a comprehensive program that prepares students for the tasks they will most likely be called upon to perform in their daily employment.

The tasks performed by medical secretaries will no doubt differ with each office, clinic, or hospital. In business and industry, those secretaries in small offices tend to perform a greater variety of tasks than those in larger firms. Secretaries employed in larger firms usually perform special tasks in their capacity as correspondence secretary, word processing operator, receptionist, etc. This same situation is to be found in medical offices. The secretary in a smaller medical practice will perform a wide variety of tasks ranging from straightening the examining rooms to transcribing the doctor's dictation. Larger practices tend to assign specific tasks to each employee. One secretary may have the responsibility of making the appointments and acting as receptionist. Another, however, may type only insurance forms, while another may only transcribe the dictation.

With these situations existing in the medical community, it is an absolute necessity that a task inventory be done to determine what type of training will prepare students to move into them.

Results of Previous Research

A search of the university library was made to determine if studies had been done relating to the duties of a medical secretary. This was done not only to discover what source material might be of value to the research, but also to see what methodology was used.

The resource material revealed a study conducted by the Minnesota State Department of Education as a curriculum project for vocational education in the state (1976). This study resulted in a task list competency record which divided the tasks of a medical secretary into 17 areas. These areas of competency included not only skills which can be measured but also areas of human relations which must be observed by the instructor. The task list was very comprehensive in dealing with the general office duties of a medical secretary, but it also included those areas of human relations which are often overlooked in our zeal to teach specific skills. The task list gave no information as to what specific tasks are required of a secretary in a physician's office as compared to those that might be required of a medical transcriptionist in a hospital. A study of this type provides itemized lists of tasks to be performed but provides no level of skill such as shorthand and typing speed that would be required of a new employee. It also provided no information as to the frequency a new employee could expect to perform each task.

Further research revealed a study by Ford (1954) which had been done to ascertain the duties of a legal secretary. Although the study was done 25 years ago, it proved to be of more value as a guide to designing a questionnaire than the Minnesota study had been. Ford

states that every good secretary must become occupationally competent in the skills of shorthand, typing, transcription, as well as filing, spelling and simple accounting. But this is not enough to label her an efficient legal secretary. This idea can be applied, also, to the training of a medical secretary as well. Both professions require a specialized training, particularly in the area of a specialized vocabulary.

Since the Ford study was made 25 years ago, the resulting numbers and percentages are of little value as the legal profession and its requirements have changed considerably. The study did provide, however, the best guide to designing a questionnaire to determine tasks of a medical secretary. An added dimension to the study was the research into the employees' ideas and attitudes toward their profession. The questionnaire reflected the amount of education they had to prepare them for the legal office and also the courses they would take if they were given the opportunity to improve their skills and increase their knowledge.

A study by Arratia (1968, p. 105) asked: "Are community colleges justified in training for the secretarial specializations and is the internship program a valid part of the training for these positions?"

Although the medical secretary is not specifically mentioned, it is a specialized position, and the training at Oklahoma State Tech does include an internship period of two months prior to graduation.

Based on a survey of business organizations in the New York area, the study not only provided information on the entry level speed and accuracy requirements for typing, but also determined there was a need for the training of secretarial specialists.

Several terminology textbooks and workbooks, many of which have accompanying cassette tapes, are available for use in medical terminology class, and the Gregg Publishing Company provides a medical shorthand text correlated with dictated tapes of medical reports. Further resource material is available in the form of handbooks for the medical secretary. These publications provide class material, but they give very little guidance in formulating a task list for training a medical secretary.

Webster's Medical Office Handbook (1979) was found to be a very comprehensive book in terms of tasks required of a medical secretary. In addition to covering office duties that are routinely performed, four chapters are devoted to medical ethics and public relations. Since all activities and practices in a physician's office or clinic cannot be taught in the classroom, the reference book is an invaluable aid to the medical secretary.

Methodology of Previous Research

In order to ascertain the tasks and the frequency with which they are performed by a legal secretary, Ford (1954) developed a check list broken down into eleven specific categories as the medium by which the survey would be conducted. All that was required of the legal secretary was to check the list for frequency and performance. This allowed a determination to be made of those duties most frequently engaging the secretaries' time. The list was submitted to experienced attorneys and a legal stenographer to eliminate outmoded or inconsequential items. The final list was then submitted to three legal secretaries to fill out before the final draft was made.

The Ford study began with a personal visit to each law office, at which time the form was explained to the respondents. These offices were limited to general law practice; large legal firms were excluded as well as those specializing in criminal law, real estate, tax, etc. Ford felt employees of these offices would be too specialized to reflect a true picture of what tasks a secretary might be expected to perform in a general practice.

The Minnesota task list (1976) was developed by a working committee of secretarial instructors and industrial representatives throughout the state. Each respondent was asked to develop task lists in 17 areas of competency in three divisions: patient contact, office procedures, and medical specialization. No information was available as to the method used to assemble the list or whether the list was pre-tested by medical secretaries on the job.

In the New York study, Arratia (1968) used a two-page questionnaire to survey 150 business organizations. The instrument was designed to gather data relating to testing standards, salary, experience, and educational requirements.

Summary

Although it is 25 years old and deals with legal secretaries, the Ford study provided valuable guidance in designing a survey to be used with medical secretaries. Teachers and leaders in the field of business education are aware of the deficiency in preparing secretarial students for technical training for specialized professions. In most respects, the medical secretary and the legal secretary are very similar. Both require skills, procedures, and office routine that are practiced in

any modern business setting. In addition, however, they require a specialized vocabulary and a knowledge of specialized typing.

The Ford study not only produced a comprehensive list of duties performed in a law office, but allowed for the secretaries to provide information as to the frequency with which they performed the duties. Although the figures and rankings in the study have changed and cannot be expected to reflect today's standards, they were of value in designing an instrument for use with medical secretaries, especially with the idea of asking their opinion as to what skills and knowledge they find critical.

The Minnesota task list does a thorough job of analyzing each area of clerical skill as to what tasks are actually performed. It does not reflect, however, the frequency with which each task is performed. The statement is made that the areas of competency are general in nature and describe the kind of individual the industrial representatives would like to hire. It was not intended to be a survey of what medical secretaries actually do, only what their employers feel they should be able to do.

The study by Arratia determined that internship training gives students experience that most employers desire. Only eight of the 150 organizations surveyed required no prior work experience when hiring new employees.

It should be mentioned that no literature was discovered that duplicated the objectives of this survey. None was available that could provide a comprehensive list of tasks required of a medical secretary. Many of the books and articles that were researched did, however, contribute information that was of value to the survey.

Chapter III

METHODOLOGY

Definitions

The terms "medical secretary" and "medical transcriptionist" are used throughout the study but are not to be interchanged since the tasks of each vary considerably and will be treated individually.

"Medical secretary" refers to that secretary employed in a clinic, physician's office, hospital, lab, or insurance company. The term refers to a person who performs general office work, meets patients, performs some clinical practices, and who may supervise other clerical employees. In addition to the qualifications required of a general secretary, this person possesses the knowledge of medical terminology, anatomy, psychology, pharmacology, and has the ability to use this information in the performance of the job.

"Medical transcriptionist" refers to that employee of a hospital, physician's office, lab, or clinic whose responsibility is to transcribe the dictation of physicians. Their primary responsibility is the transcription of histories, physical examinations, discharge summaries, consultation notes, progress notes, and operative reports which are to become part of the patient's file. This position usually does not require the performance of those tasks generally thought of as general office procedures. It does require, however, good typing speed and

accuracy combined with a thorough knowledge of medical terminology. This employee frequently performs these tasks with the use of word processing equipment such as automatic typewriters, computers, and a centralized recording system.

Selection of the Subjects

Sixty-three medical secretaries in 41 physicians' offices and clinics in the Tulsa, Oklahoma area were surveyed. The respondents included those in small practices in the surrounding towns and larger practices in the city of Tulsa. The secretaries were employed by specialists, as well as general practitioners. To broaden the study, secretaries were also contacted in radiology and pathology laboratories. The types of medical practices surveyed are given in Appendix D.

Fifty medical transcriptionists were surveyed, bringing the total instruments distributed to 113. Most large medical practices and all hospitals employ those medical secretaries who wish to specialize in the transcription of medical dictation. These positions do not require the performance of many of the tasks thought of as general secretarial procedures; therefore, another questionnaire was designed and distributed to transcriptionists in hospitals and clinics in the Tulsa area.

Employment records for the medical secretarial program at Oklahoma State Tech for the past seven years reflect that the graduates have been employed in one-physician offices, clinics with several doctors, small community hospitals, large metropolitan hospitals, and various types of laboratories. Some report that in addition to their clerical duties they also act as assistant to the physician. With this variety of positions being filled by the graduate, it was necessary that the survey

provide information not only from a variety of medical settings but also from a cross section of secretaries employed by them.

The survey was limited to the medical practices and hospitals in the Tulsa area for three reasons:

1. The majority of the students in the medical secretarial program are from Eastern Oklahoma and prefer to seek employment in this area.
2. Limiting the survey to the Tulsa area allowed that a personal contact could be made with most of the secretaries and a follow-up phone call could be made to those who did not make an intitial reply.
3. The Tulsa area includes large metropolitan hospitals, smaller clinics, and medical practices of all sizes and specialities. This provides an ideal sample from which to collect information and draw conclusions.

Development of the Instrument

To aid in the development of the instrument, the following definitions of task were used:

Some activity (often assigned) in which people engage (Davis, 1974, p.154).

One of the work operations that constitutes a logical and necessary step in the performance of a duty (Morsh, 1961, p. 15).

In order to ascertain which tasks are required of the medical secretary and the frequency with which they are performed, a check list was chosen as the method by which the survey would be conducted. In constructing the instrument, medical texts and handbooks were consulted and a tentative list of tasks was made. To encourage a quick response, the majority of the items on the questionnaire required only a check mark to reflect the frequency and performance of each item. To gain additional information that would be of value in planning course

material, the respondents were asked to give additional data on the length of their employment, typing and shorthand skills, previous experience, type of equipment used, and the importance of medical terminology to the performance of their job.

The first draft was submitted to the director of the medical records department in a local hospital and to a medical secretary with 22 years of experience. It became obvious the list was too lengthy and awkward to be of value. Many of the tasks were performed only by a medical secretary while the skill of transcription is required of a medical transcriptionist. Since many secretaries do specialize in transcription, a separate instrument was designed to gather information concerning requirements for their positions. Since the transcriptionists do few of the general secretarial procedures, it was not advisable to include these tasks on the instrument.

This decision resulted in a three-page instrument for medical secretaries to reflect the frequency with which they perform 125 tasks in 10 areas: general office skills, mail, dictation, bookkeeping, filing, insurance, telephone usage, office machines, typing, and clinical practices. The one-page instrument for medical transcriptionists asked for information concerning their production rate, typing speed requirements, type of equipment used, previous experience, and previous training.

The instruments used for the survey may be found in Appendix A.

Collection of the Data

Sixty-three medical secretaries were asked to take part in the survey by providing information on a three-page instrument. A personal

visit was made to 47 of the secretaries and the questionnaire was mailed to the remaining 16 who were employed in small medical practices in the surrounding area. Even though most of the secretaries visited were busy they were willing to take time to discuss the instrument to learn how their information would be used in the study. Due to the nature of medical practice, it was explained that the instrument asked for no confidential information.

Several of the secretaries and transcriptionists visited were graduates of the medical secretarial program at Oklahoma State Tech. Their information was of special value since they were able to give facts and opinions as to how their training compared with the tasks actually encountered on the job.

Each instrument included a stamped, self-addressed envelope to encourage a quick response and to make it as convenient as possible for the respondent to return it. The instruments along with an appropriate cover letter (See Appendix B) were delivered or mailed in September, 1979. The last return was received the last week of October, 1979.

Since they have a daily production rate to maintain, it was not advisable to visit with 50 medical transcriptionists in person. The director of medical records who assisted with the design of the instrument attended a meeting of Accredited Record Technicians where she gave each supervisor attending enough instruments to distribute to the transcriptionists under their direction. The instruments, along with self-addressed, stamped envelopes, were distributed in the various hospitals.

The printed questionnaire was chosen as a means of gathering the data primarily because of a time factor. Since the instrument required that 125 items be checked for performance and frequency, it was necessary to

leave it to be completed during the secretaries' spare time. It would be impossible to gather answers to such a large number of items through a personal interview without involving more time than their duties would allow.

The personal interview would have been of greater value, however, in determining the duties of a medical transcriptionist. The information desired did not cover detailed lists of tasks, but rather what is required in the way of production and accuracy. More hospitals each year are going on-line with the computer to enter medical transcription to a patient's chart, and new word processing equipment is being added at a surprising rate. This survey attempted to ascertain what percentage of transcriptionists use this equipment. Because of the production rate required of transcriptionists, it was not possible to spend time through a personal interview to gather this information.

At the end of two weeks, a follow-up call or visit was made to those who had not responded. A follow-up was not done regarding those instruments given to medical transcriptionists since they were taken as a group by the supervisor and distributed. There was no way to determine which employees within a given hospital had responded; the majority of the responses arrived within three weeks after the distribution.

Analysis of the Data

As the completed instruments were returned, the results were tabulated on master sheets designed for this purpose. Tasks were recorded to reflect if they were performed regularly, sometimes, or never. Also a summary was made of the "fill in" information. The raw data may be found in Appendix C.

This method of tabulating was suitable for reporting the results since it allowed for a frequency ranking of each task. It further allows for conversion of the fill-in information into percentages which will be of value in making conclusions and recommendations concerning possible course changes.

Chapter IV

RESULTS

Return Rates

In September, 1979, 63 medical secretaries and 50 medical transcriptionists in the Tulsa area were asked to complete a questionnaire concerning tasks required in the performance of their jobs.

Approximately one-half of the returns were received by the first week of October, at which time follow-up calls and visits were made to those secretaries and transcriptionists from which there was no response. As was expected, in offices with more than one secretary and/or transcriptionist, either all responded to the questionnaire or none of them responded. The follow-up calls and visits encouraged enough additional responses that the study was considered to be complete by the end of October. At that time, a total of 42 medical secretaries and 39 of the transcriptionists had responded, which was a return rate of 71.7 percent.

Data Summary

The questionnaire for the medical secretaries included 125 tasks in 10 categories. Since there were some affirmative responses to all 125 tasks as being performed regularly or sometimes, it can be concluded that all tasks listed are considered to be performed by medical secretaries. The ten categories were studied individually with the tasks

being ranked according to the percentage of the 42 secretaries who reported they performed the tasks, whether they were performed regularly or occasionally.

The fill-in information from the transcriptionists was compiled to learn about experience, performance standards required, and the equipment used. After ranking and analysis of the tasks, the data appears on the following tables.

General Office Duties

There are a large number of routine office duties performed by medical secretaries that do not fall into a skill category such as typing and transcription do. According to Table I, all 42 secretaries reported they gave appropriate information to patients, delivered messages, and acted as receptionist.

It should be noted that nine of the tasks involve human relations. When the medical secretaries were given an explanation of the study, many expressed the opinion of how important the qualities of compassion and patience are to the successful performance of their jobs. These qualities are important not only in dealing with the patients, but also with fellow workers since 55 percent of the respondents reported that they supervise other clerical employees.

Dictation in the Office

The taking and transcribing of dictated material is assumed to be one of the tasks of any secretary. This is not the case, however, with medical secretaries. As Table II reveals, 83 to 93 percent of the secretaries never take shorthand either in person or over the phone.

Table III reflects that 31 percent of the secretaries know shorthand but only two percent reported it was a requirement for the job.

TABLE I
GENERAL OFFICE DUTIES PERFORMED
REGULARLY OR SOMETIMES

Task	Number	Rank
Give appropriate information to the patient	42	1
Deliver oral or written messages	42	1
Act as receptionist	42	1
Make appointments	41	2
Screen callers	40	3
Discuss fees with patients	40	3
Escort patients to office or examining room	40	3
Open the office	38	4
Organize office routine	37	5
Make introductions	36	6
Straighten reception area	35	7
Compose letters	35	7
Order supplies	34	8
Supervise other clerical employees	23	9
Select magazine subscriptions	21	10
Keep physician's personal records	20	11
Make physician's travel arrangements	17	12

Table II reveals that 55 percent of the secretaries also never transcribe from a recorder. It can be assumed that the 45 percent who do transcribe do it along with their other duties. As mentioned in Chapter III, larger practices employ full-time transcriptionists and this data will be discussed later in the chapter.

TABLE II
PERCENTAGE OF SECRETARIES WHO TAKE AND
TRANSCRIBE DICTATION

Tasks	Regularly	Sometimes	Never
Take and transcribe shorthand notes	7%	9.5%	83.5%
Take shorthand over the telephone	0	12.0	88.0
Take shorthand notes of meetings	0	7.0	93.0
Transcribe dictation from a recorder	26	19.0	55.0

TABLE III
SHORTHAND SKILLS

	Yes	No
Percentage who take shorthand	31%	69%
Percentage that reported shorthand a job requirement	2	98

Telephone

A common weakness employers find in new clerical workers is poor telephone skills. Yet the survey reveals these skills are a vital part of the job with 95 percent reporting they place local and long distance calls on a regular basis. Table IV ranks the various telephone tasks that are performed regularly and sometimes.

TABLE IV
TELEPHONE USAGE

Tasks	Number	Rank
Place local calls	40	1
Answer telephone	40	1
Place long distance calls	40	1
Keep directory up to date	39	2
Screen incoming calls	38	2
Transfer calls	37	3
Record telephone messages	32	5
Check long distance calls with statement	12	6
Operate switchboard	6	7

Office Machines

Twenty-one secretaries (50 percent of those who responded) reported they use two different typewriters in the performance of their jobs. The manual and standard electric are used primarily for completing the many forms necessary in a medical practice. This frees the automatic and correcting typewriters for correspondence and the transcription of dictation. Table V reflects the small number (10 percent) who still use manual typewriters.

Table VI reflects the change technology has brought about in respect to the duplicating of paper work. No longer does the medical secretary make carbon copies of correspondence, statements, forms, and reports. Ninety-eight percent report they use copiers for this type of duplication which allows time for more productive work. The figures also show that the mimeograph and spirit duplicator are rarely used.

TABLE V
 TYPEWRITERS USED BY MEDICAL SECRETARIES

Kind	*Number	Percentage
Standard Electric	24	57.0
IBM Selectric	15	36.0
Self-correcting	15	36.0
Automatic	5	12.0
Manual	4	9.5

*50 percent reported the use of two different typewriters

TABLE VI
 PERCENTAGE OF SECRETARIES USING
 OFFICE MACHINES

Machine	Total	Percentage
Copier	41	98%
10-key adding machine	26	62
Printing calculator	19	45
Mimeograph	2	5
Spirit duplicator	1	2

Filing

Table VII indicates those filing tasks performed regularly and sometimes by the medical secretaries. Locating and retrieving documents rank first on the list, but maintaining a tickler file ranked

last on the list. Most secretaries keep such a file to remind them of upcoming tasks and events, but because of a possible misunderstanding of the term "tickler", they failed to report it.

TABLE VII
FILING TASKS PERFORMED REGULARLY AND
SOMETIMES BY THE MEDICAL SECRETARY

Task	Number	Rank
Locate and retrieve documents	42	1
Prepare folders and guides	40	2
Revise files	38	3
Prepare documents for filing	37	4
Maintain record of materials taken	29	5
Maintain index files	27	6
Maintain physician's personal files	22	7
Maintain tickler file	9	8

Webster's Medical Office Handbook (1979) states that the two basic classification methods of filing are alphabetical and numeric. But the secretary may also use derivations and combinations of these two methods. Table VIII shows the number of secretaries using each method with 16 also reporting they use two different methods of filing. Those using diagnostic and color code methods also use alphabetic.

TABLE VIII
FILING METHODS

Method	*Number	Percentage
Alphabetic	36	86
Numeric	11	26
Color code	8	19
Diagnostic	3	7

*38 percent of the 42 responding use two methods of filing

Mail

Most outsiders would be surprised at the amount of mail that arrives in a physician's office each day. Although it is usually the function of the secretary or receptionist, all office personnel should be able to handle mailing procedures. Table IX ranks those procedures that are done regularly and sometimes by the medical secretary. Since even the task which ranks last is performed by 88 percent of the secretaries, it can be assumed that the majority of medical secretaries should be prepared to handle the mail in an efficient manner.

Office Bookkeeping and Banking

The type of records kept by physicians are not specified by law. Those records that are kept, however, must be accurate, systematic, and permanent. Preparing receipts, accepting payments, maintaining patients' ledgers, and sending statements rank highest on the list of bookkeeping

tasks. However, financial records such as tax reports, payroll, and bank statements rank lowest on the list. It should be noted that five secretaries reported they sign checks for the medical practice.

TABLE IX
MAILING TASKS PERFORMED REGULARLY AND
SOMETIMES BY THE MEDICAL SECRETARY

Task	Number	Rank
Sign for packages, registered mail, etc.	41	1
Sort incoming mail	40	2
Prepare letters and packages for mailing	39	3
Open incoming mail	39	3
Attach information to incoming mail	37	4
Make filing or calendar notations on mail	35	5

Insurance Forms

Dealing with insurance matters is a major segment of the medical secretary's responsibility, and it is important to patient and physician alike. In addition to filling out the claim forms, the secretary must submit supporting information to verify the cause and degree of the disability. Table XI indicates that the forms most frequently completed are Blue Cross/Blue Shield, private and group insurance, and those dealing with government funds which are Medicare/Medicaid, CHAMPUS, FEHB, and worker's compensation. Thirty-eight of the 42 secretaries reported

they complete some insurance forms on a regular basis. The type of forms completed depend to a great extent on the type of medical practice that is involved. The four secretaries who indicated they did not complete any insurance forms reported their office employs an insurance clerk to handle these tasks.

TABLE X
BOOKKEEPING AND BANKING TASKS HANDLED
BY THE MEDICAL SECRETARY

Task	Number	Rank
Accepts payments from patients	40	1
Prepare receipts	40	1
Maintain patients' ledgers	39	2
Send statements to patients	39	2
Handle petty cash	36	3
Make bank deposits	33	4
Keep checkbook	20	5
Prepare payroll	15	6
Prepare quarterly income tax, withholding, and FICA	11	7
Reconcile bank statement	11	7
Prepare financial statements	9	8
Sign checks	5	9

Typing

Typing occupies a large portion of a secretary's time and includes a variety of material. For better interpretation, the data was divided into typing tasks which are considered to be of a general nature and

into tasks that are classified as medical typing. Table XII compares the general typing tasks and indicates that the items typed most frequently are correspondence, form letters, and form paragraphs with fill-in information required. The typing of minutes of meetings, spirit masters, and stencils ranked lowest on the list.

TABLE XI
INSURANCE FORMS COMPLETED REGULARLY AND
SOMETIMES BY THE MEDICAL SECRETARY

Forms	Number	Rank
Blue Shield	36	1
Private insurance forms	35	2
CHAMPUS*	33	3
Medicare, Medicaid	32	4
Group insurance	32	4
Blue Cross	27	5
Worker's compensation	26	6
FEHB**	10	7
Health Maintenance Organizations	6	8
Dental care	2	9
Visual care	1	10

* Civilian Health and Medical Program of the Uniformed Services

** Federal Employees' Health Benefits Program

For clearer interpretation, the medical typing which consists of forms and reports is broken down in Table XIII into those most frequently typed and those rarely typed.

TABLE XII
 GENERAL TYPING TASKS PERFORMED REGULARLY
 AND OCCASIONALLY BY MEDICAL SECRETARIES

Task	Number	Rank
Business correspondence	33	1
Form letters	31	2
Form paragraphs with fill-in information	26	3
Personnel forms	17	4
Physician's itinerary	17	4
Manuscripts for articles	13	5
Minutes of meetings	3	6
Stencils	3	7
Spirit masters	2	8

TABLE XIII
 MOST FREQUENTLY AND LEAST FREQUENTLY
 TYPED MEDICAL FORMS

Most Frequently Typed	Least Frequently Typed
Case histories	Operation reports
Discharge summaries	Surgical reports
Pathology reports	Admission report forms
Consultation reports	Pre-admission forms
Physical examination	Nursing home admission
Patient history	Admission and discharge register
Patient index cards	Autopsy reports
Patient transfer forms	Birth records
Welfare forms	Death records
Medical lab reports	Tissue reports

Clinical Practices

Textbooks and handbooks for the medical secretary are available which include information on the performance of tasks in the category of medical assistant. A Textbook for Medical Assistants (1975) states that a medical assistant is a combination of secretary, nurse, X-ray assistant, and laboratory assistant. The text explains that in many instances, particularly in the small medical practice, the secretary may perform semi-technical duties such as taking temperature and pulse rates, preparing patients for examination, and sterilizing instruments.

One purpose of the study was to determine what percentage of the medical secretaries perform any clinical practices as part of their daily tasks. Thirty-seven of the 42 secretaries (88 percent) indicated they perform these tasks occasionally or on a regular basis. This is reflected in job titles also, since six secretaries reported their title as medical assistant.

Table XIV indicates that the most frequently performed tasks in the area of clinical practices are preparing the patient for examination, preparing and cleaning the examining room, taking and recording blood pressure and temperature, and the collecting of urine and blood samples. Since clinical practices vary from office to office according to the type of specialization of the physician, it was not possible to anticipate all the duties involved. The questionnaire allowed for the secretary to add any additional duties; these are indicated by the asterisk.

TABLE XIV
 CLINICAL PRACTICES PERFORMED REGULARLY
 OR OCCASIONALLY

Task	Number	Rank
Prepare patient for examination	29	1
Prepare examination room	27	2
Clean examination room	25	3
Take and record temperature and blood pressure	24	4
Collect, label, and deliver urine and blood	21	5
Take pulse and respiration	16	6
Perform basic sterilization	14	7
Prepare patient for X-ray	12	8
Prepare patient for EKG	10	9
List hemocult*	1	10
Prepare stool slides*	1	10
Give injections*	1	10
Run film in dark room*	1	10
Remove casts and sutures*	1	10

*Indicates tasks not on questionnaire but added by the respondent

Medical Terminology

The following information reflects that the majority of the secretaries feel that a knowledge of medical terminology is important to the performance of their job. The four who felt it was not important explained that their primary duties were to act as the receptionist and as billing clerks, positions which require very little knowledge of terminology. It should be noted that even though 9.5 percent felt it was not important to success on the job, not one checked that it was "not necessary at all."

QUESTION: "Is a knowledge of medical terminology important to the successful performance of your job?"

YES	90.5 percent
NO	9.5 percent

QUESTION: "It is absolutely necessary."	55 percent agree
"It is helpful to know."	45 percent agree
"It is not necessary at all."	0 percent agree

Experience and Skills

An evaluation of the remaining data provided the following information about the background, training, and skills of the secretaries who participated in the study:

The secretaries reported experience of from one year to 32 years with an average of 5.3 years on the job; 52 percent reported that they had taken additional training to improve their job skills.

Twenty-six of the 42 secretaries listed typing speeds of from 50 to 70 words per minute with an average of 59 words per minute. This cannot be given serious consideration since some reported they were merely estimating the speed and many of them reported they were not even tested as a requirement for employment.

Chapter III reported that many secretaries specialize in medical transcription. Because of the nature of their duties, a separate instrument was developed. The remainder of this chapter will be devoted to information concerning production rate, typing speed requirements, equipment used, and previous experience of these medical transcriptionists who work in clinics and hospitals.

Production

The skill of a medical transcriptionist is evaluated by the amount

and quality of dictation produced during a working day. The transcription departments of hospitals and clinics vary in the methods used to determine this production. Table XV indicates that slightly over one-half of the 39 transcriptionists' production is measured in lines per day. Three transcriptionists added that their production is not evaluated in terms of lines, pages, or units, but rather in terms of whether they meet a certain "deadline."

TABLE XV

METHODS OF COUNTING TRANSCRIPTION PRODUCTION

Method	Number	Percentage
Lines per day	22	53%
Pages per day	5	14
Minutes per day	5	14
Units (reports) per day	4	11
Meeting a deadline*	3	8

Typing speed and knowledge of medical terminology are both very necessary to the production rate of a transcriptionist. The 39 medical transcriptionists reported typing speeds of 50 to 75 words per minute, with an average speed of 60 words per minute. The job description for transcriptionists employed by Okmulgee Memorial Hospital, dated January, 1979, states they "must type at least 60 words per minute."

Table XVI reflects that 64 percent of the transcriptionists have taken some course work to learn medical terminology. The remaining 36 percent report they learned it on the job.

TABLE XVI
PERCENTAGE OF RESPONDENTS WHO LEARNED MEDICAL
TERMINOLOGY FROM A COURSE OR ON THE JOB

	Number	Percentage
Learned medical terminology on the job	14	36%
Took a formal course in terminology	25	64

The transcriptionists reported work experience ranging from one year to 15 years with an average of six years experience. Table XVII indicates that the majority punch a time clock and log their own work but do not chart their own transcription. Some of the 64% who do not chart their own work reported this task was performed by clerical personnel in the medical records department.

Equipment

The growth of word processing has had a profound effect on medical transcription. As Table XVIII shows, none of the transcriptionists reported the use of a standard electric typewriter, and only 15 percent still use the IBM Selectric typewriter.

TABLE XVII
NON-TRANSCRIPTION DUTIES

	Yes	No
Do you punch a time clock?	25 (64%)	14 (36%)
Do you complete a log sheet?	34 (87%)	5 (13%)
Do you chart your own work?	14 (36%)	25 (64%)

TABLE XVIII
TYPEWRITERS USED BY MEDICAL TRANSCRIPTIONISTS

Kind	*Number	Percentage
Standard Electric	0	0%
IBM Selectric	6	15
Correcting	17	44
Automatic	13	33

*Three of the 39 transcriptionists did not indicate the typewriter used

Table XIX provides information relating to the type of dictation systems used by the medical transcriptionist. The majority reported the use of a centralized system and six of those reporting use of individual recorders also use a central system or a loop system.

TABLE XIX
TYPE OF DICTATION SYSTEM USED

System	Number	*Percentage
Centralized	30	77%
Individual recorders	10	26
Continuous loop	5	12

*Six of the 39 transcriptionists (15%) indicated the use of two systems.

Since the primary responsibility of a medical transcriptionist is to transcribe the physician's dictation into forms and reports which will become a part of the patient's file, a study would not be complete without an analysis of the reports. Table XX indicates that the bulk of the transcription is case histories, physical examinations, discharge summaries, consultation reports and surgical reports.

Results of Analysis

A study of secretaries in 41 medical offices, labs, and clinics reveals they must not only be occupationally competent in basic clerical skills, but they must have that degree of specialization called for by their profession. This specialization involves first a knowledge of medical terminology which the majority of the respondents felt was necessary for the performance of their job. It involves also a knowledge of medical forms and the ability to complete them accurately. This specialization requires further a knowledge of basic clinical

TABLE XX
 REPORTS AND FORMS TYPED BY
 MEDICAL TRANSCRIPTIONISTS

Kind	Number	Rank
Case history	35	1
Physical examination	35	1
Discharge summary	34	2
Consultation	34	2
Surgical reports	30	3
Admission reports	21	4
* X-ray interpretations	10	5
* Progress notes	8	6
* Emergency room reports	6	7
* EEG's	6	7
Birth and death records	5	8
* Evaluations	4	9
Autopsy reports	4	9
Patient transfer forms	4	9
Pathology reports	3	10
Preadmission records	3	10
* Minutes of meetings	3	10
* Intern logs	2	11
Patient index cards	1	12
* Doctor's certification reports	1	12
* EKG'S	1	12
Nursing home admission	0	13
Admission and discharge register	0	13

*Reports not on the instrument but added by the respondent

practices since all secretaries reported they were called upon to perform them at one time or another.

The data shows that a typing speed of approximately 50 to 60 words per minute is required for job competency with emphasis on accuracy. However, shorthand skill is not required according to the response, and is rarely used by the medical secretaries.

Analysis of the data from 39 medical transcriptionists reveals they rarely perform general secretarial duties, but their primary task is the transcription of physicians' dictation with emphasis on accuracy. This accuracy demands good typing skills and a knowledge of medical terminology. The transcriptionist in a modern hospital or clinic can expect to perform these tasks on modern word processing equipment.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The purpose of the study was to determine through a survey what tasks are regularly performed by medical secretaries and what skills are necessary for success on the job.

The research was conducted to learn:

1. What tasks are regularly performed by medical secretaries.
2. In what areas and to what extent is medical terminology required.
3. What skill levels of typing and shorthand are required.
4. What knowledge and skill is required in medical transcription.

The data was obtained from 42 medical secretaries and 39 medical transcriptionists employed by hospitals, clinics, laboratories, and physicians in the Tulsa area. They were asked to complete a questionnaire concerning tasks required on their job and the frequency with which they perform them.

Analysis of the data revealed the medical secretary must be competent in basic clerical skills with a specialization in medical terminology and medical typing. The majority perform some clinical tasks in the category of medical assistant. Several stressed the importance of personal qualities such as compassion and patience in dealing with the pressure of their job.

Data from the medical transcriptionists reveal a need hospitals and clinics have for the secretary who desires to specialize in the skill of transcription. This position requires good typing speed and accuracy and a thorough knowledge of medical terminology. The medical transcriptionist entering the job market today must also be skilled in the use of word processing equipment which has had a tremendous impact on the production and quality of work in a medical transcription department.

Conclusions

On the basis of the data interpretation, a training program for medical secretaries must build skill in the basic clerical areas which include typing speed and accuracy, filing, spelling and word usage, simple accounting, and general office procedures. The program must, in addition, train for that degree of specialization required of a secretary in the medical profession. This specialization calls for a knowledge of medical vocabulary which involves spelling, meaning and correct usage of medical terms, anatomy, pharmacology, disease conditions, and laboratory terms. The data points out also that if the program is to train competent medical secretaries, it must include some training in the clinical practices area since most secretaries reported performing tasks in the medical assistant category.

It can be concluded from the study that there is a job market for those secretaries wishing to specialize in medical transcription. Physicians' offices, clinics, and hospitals depend on trained personnel to transcribe the dictation which is to become a part of the patients' files. Not only are there numerous positions open now to the medical secretarial graduate, but the future looks bright because of the

increase in records required of the medical community by advanced technology, patient load, and increased government regulations.

Recommendations

Based on the conclusions drawn from the raw data, the medical secretarial program at Oklahoma State Tech is training students to enter the job market as qualified medical secretaries. The two-year Associate degree program provides training in the basic clerical skills with emphasis on typing, shorthand, offices practices, and word processing.

The program adds training for the specialization of medical typing, shorthand, transcription, and terminology. Even though the survey showed that only two percent of the secretaries reported that shorthand was a requirement for their job, it is likely that shorthand will be retained in the program for two reasons:

1. Even though shorthand is not a requirement for the job, it is certainly a skill which would add to the competency of the secretary. Taking of dictation is not the only use of shorthand skill; the medical secretary would find it invaluable in taking notes over the telephone and taking minutes of meetings and conferences.
2. Shorthand skill is an avenue for growth. Business and industry still demand shorthand skill for upper level secretarial positions. If circumstances caused a medical secretary to seek employment in an area other than the medical field, the skill of shorthand would be critical to getting the position and promotion to higher level positions.

Since a majority of the secretaries reported the performance of clinical duties in the area of medical assistant, it is recommended that the internship program be continued. Special attention needs to be given to see that the student is placed in offices where they will be given not only the opportunity to observe, but also to actually assist in clinical practices. It is not feasible to train for these

practices in a business education classroom; therefore, the two-month internship can be a valuable and necessary part of the secretarial student's training.

Since the beginning of the study, changes have been made in the course content of the word processing class at Oklahoma State Tech and additional equipment has been purchased. This will allow training for the skill of transcription on equipment which the graduate can expect to find on the job.

It is further recommended that the Business Education Department work closely with the medical community in order to be aware of changes not only in equipment being used, but also in office procedures and job requirements.

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APPENDIX A

INSTRUMENT

MEDICAL SECRETARY:

Please check how often you perform the following duties:

Regu- larly	Some Times	Never
----------------	---------------	-------

GENERAL OFFICE DUTIES

_____	_____	_____	Open the office
_____	_____	_____	Straighten reception area
_____	_____	_____	Select magazine subscriptions
_____	_____	_____	Order supplies
_____	_____	_____	Act as receptionist
_____	_____	_____	Screen callers
_____	_____	_____	Make appointments
_____	_____	_____	Give appropriate information to patients
_____	_____	_____	Discuss physician's fees with patient
_____	_____	_____	Compose letters
_____	_____	_____	Make physician's travel arrangements
_____	_____	_____	Keep physician's personal records
_____	_____	_____	Make introductions
_____	_____	_____	Deliver oral or written messages from patient to physician
_____	_____	_____	Escort patients to physician's office or examining room
_____	_____	_____	Organize office routine
_____	_____	_____	Supervise other clerical employees
_____	_____	_____	List any others you feel important
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

DICTATION IN THE OFFICE

_____	_____	_____	Take and transcribe shorthand notes
_____	_____	_____	Take shorthand dictation over the telephone
_____	_____	_____	Take shorthand notes of meetings
_____	_____	_____	Transcribe from a recorder

TELEPHONE

_____	_____	_____	Answer the telephone
_____	_____	_____	Operate switchboard
_____	_____	_____	Transfer calls
_____	_____	_____	Record telephone messages
_____	_____	_____	Screen incoming calls
_____	_____	_____	Place local calls
_____	_____	_____	Place long distance calls
_____	_____	_____	Compare record of long distance calls
_____	_____	_____	Keep directory of frequently called numbers

Regu- larly	Some- times	Never	<u>OFFICE MACHINES</u>
_____	_____	_____	Operate manual typewriter
_____	_____	_____	Operate standard electric typewriter
_____	_____	_____	Operate Selectric typewriter
_____	_____	_____	Operate self-correcting typewriter
_____	_____	_____	Operate automatic typewriter
_____	_____	_____	Operate mimeograph machine
_____	_____	_____	Operate spirit duplicator
_____	_____	_____	Operate copier (Xerox, etc.)
_____	_____	_____	Operate 10-key
_____	_____	_____	Operate printing calculator
_____	_____	_____	Other _____
			<u>FILING</u>
_____	_____	_____	Prepare folders and guides
_____	_____	_____	Prepare documents for filing
_____	_____	_____	Locate and retrieve documents from files
_____	_____	_____	Maintain Record of material taken from files
_____	_____	_____	Revise files to keep them current
_____	_____	_____	Maintain index files
_____	_____	_____	Maintain "tickler" file
_____	_____	_____	Maintain physician's personal files
_____	_____	_____	File by the following method:
_____	_____	_____	Alphabetic
_____	_____	_____	Numeric
_____	_____	_____	Diagnostic
_____	_____	_____	Other: _____
			<u>MAIL</u>
_____	_____	_____	Sort incoming mail
_____	_____	_____	Open incoming mail
_____	_____	_____	Attach pertinent information to incoming mail
_____	_____	_____	Make filing or calendar notation on mail
_____	_____	_____	Sign for packages, registered mail, etc.
_____	_____	_____	Prepare letters and packages for mailing
			<u>OFFICE BOOKKEEPING AND BANKING</u>
_____	_____	_____	Handle petty cash
_____	_____	_____	Accept payments from patients
_____	_____	_____	Prepare receipts
_____	_____	_____	Maintain patients' ledgers
_____	_____	_____	Send statements to patients
_____	_____	_____	Make bank deposits
_____	_____	_____	Keep checkbook
_____	_____	_____	Sign checks
_____	_____	_____	Reconcile bank statement
_____	_____	_____	Prepare financial statements
_____	_____	_____	Prepare payroll
_____	_____	_____	Prepare quarterly income tax, withholding, FICA

Regu- larly	Some- times	Never	<u>TYPING</u>
_____	_____	_____	Business correspondence
_____	_____	_____	Form letters
_____	_____	_____	Form paragraphs and fill-in information
_____	_____	_____	Minutes of meetings or conferences
_____	_____	_____	Personnel forms
_____	_____	_____	Physician's itinerary
_____	_____	_____	Manuscripts for articles written by the physician
_____	_____	_____	Spirit masters
_____	_____	_____	Stencils
_____	_____	_____	Medical records, reports and forms which include:
_____	_____	_____	case histories
_____	_____	_____	discharge summaries
_____	_____	_____	operation reports
_____	_____	_____	pathology reports
_____	_____	_____	consultation reports
_____	_____	_____	physical examination
_____	_____	_____	patient history
_____	_____	_____	surgical report
_____	_____	_____	admission reports
_____	_____	_____	hospital admission forms
_____	_____	_____	pre-admission forms
_____	_____	_____	patient index cards
_____	_____	_____	patient transfer forms
_____	_____	_____	nursing home admission
_____	_____	_____	admission and discharge register
_____	_____	_____	welfare forms
_____	_____	_____	autopsy reports
_____	_____	_____	birth records
_____	_____	_____	death records
_____	_____	_____	medical lab reports
_____	_____	_____	tissue reports
_____	_____	_____	Other: _____
_____	_____	_____	_____
_____	_____	_____	_____

Yes No Do you take shorthand

Yes No If so, is it required for your position?

Yes No Is a knowledge of medical terminology important to the successful performance of your job?

Would you say it is:

_____ Absolutely necessary

_____ Helpful to know

_____ Not necessary at all

Regu-
larly

Some-
times

Never

INSURANCE FORMS COMPLETED

_____	_____	_____	Private insurance
_____	_____	_____	Blue Cross
_____	_____	_____	Blue Shield
_____	_____	_____	Health Maintenance Organs. (HMO'S)
_____	_____	_____	Dental care
_____	_____	_____	Visual care
_____	_____	_____	Group insurance forms
_____	_____	_____	Worker's compensation
_____	_____	_____	Government sponsored plans (Medicare, Medicaid)
_____	_____	_____	CHAMPUS
_____	_____	_____	FEHB
_____	_____	_____	Other: _____
_____	_____	_____	_____
_____	_____	_____	_____

CLINICAL PRACTICES

_____	_____	_____	Prepare examination room
_____	_____	_____	Prepare patient for examination
_____	_____	_____	Prepare patient for X-ray
_____	_____	_____	Prepare patient fro EKG
_____	_____	_____	Take and record temperature and blood pressure
_____	_____	_____	Take and record pulse and respiration
_____	_____	_____	Assist with collection, labeling, and delivery of specimens such as urine and blood
_____	_____	_____	Clean examination rooms
_____	_____	_____	Perform basic sterilization technique of instruments
_____	_____	_____	List others not mentioned:
_____	_____	_____	_____
_____	_____	_____	_____

Job Title:

Place of employment:

_____	_____	Hospital
_____	_____	Clinic
_____	_____	Physician's office
_____	_____	Other _____

Have you taken additional training in your field
(correspondence course, internship program,
in-house training, etc.) _____

COMMENTS:

1. How long have you worked as a medical transcriptionist? _____

2. Have you taken additional training in your field? (correspondence, internship program, in-house training, etc.) _____

3. What previous positions have you held? _____

4. Have you taken a course in medical terminology or did you learn it on the job? _____

5. What was the minimum typing speed required for your position? _____

6. Yes No Do you complete a log sheet to indicate work completed? 7. TYPE OF DICTATION SYSTEM

Yes No Do you punch a time clock?

Yes No Do you chart you own work or

Yes No Is it charted by someone such as a medical records clerk?

____ Centralized
____ Individual Recorder
____ Other

8. IS YOUR PRODUCTION COUNTED IN

____ pages per day
____ lines per day
____ keystrokes per day
____ minutes per day
____ other

9. DO YOU OPERATE A

____ Standard Electric typewriter
____ Selectric Type-typewriter
____ Correcting typewriter
____ Automatic typewriter

10. REPORTS AND FORMS TYPED:

____ case histories
____ discharge summaries
____ pathology reports
____ consultation reports
____ physical examination
____ surgical reports
____ admission reports
____ preadmission forms
____ patient index cards
____ patient transfer forms
____ nursing home admission
____ admission and discharge register
____ autopsy reports
____ birth and death records

____ Other: _____

APPENDIX B

COVER LETTERS

September 15, 1979

Dear Medical Secretary:

Would you please take a few minutes and complete the attached form which consists of some general questions about your profession. This information will be of great value to me for two reasons:

1. I am in the process of gathering information from medical secretaries concerning their duties and standards of performance. This information will be used in writing my thesis for a Master's degree from Oklahoma State University.
2. For the past seven years I have been responsible for the course content of our Medical Secretarial program here at Oklahoma State Tech. Further changes in the course content are now being considered and the information you furnish will be invaluable to me and the Business Education Department in helping us make decisions on the course content and set some realistic goals for our students.

I can think of no one more qualified to guide us in the organization of the medical secretarial classes than you, the medical secretary who is actually working in this phase of health care.

I realize that duties of the medical secretary vary from office to office, so please feel free to add any comments or additional information that you feel would be of help in training future medical secretaries. The reputation of our medical secretarial graduates has been excellent and your information can help us continue to furnish qualified employees for the many secretarial positions open in the health care field.

Sincerely yours,

Peggy Butler, Supervisor
Business Education

September 15, 1979

Dear Medical Transcriptionist:

Would you please take a few minutes and complete the attached form consisting of some general questions about your profession. This information will be of great value to me for two reasons:

1. I am in the process of gathering information from medical transcriptionists and medical secretaries concerning their duties and standards of performance. This information will be used in writing my thesis for a Master's degree from Oklahoma State University.
2. For the past seven years I have taught the class of Medical Dictation and Transcription here at Oklahoma State Tech in Okmulgee, and I am now in the process of making further changes in the course content. The information you furnish will be invaluable to me and to the Business Education Department in helping us make decisions on the course content and to set some realistic goals for our students.

I can think of no one more qualified to guide us in the organization of the Medical Dictation and Transcription class than you, the medical transcriptionist who is actually working in this health field. Please feel free to add any additional information you feel would be of value in helping us train future employees for your profession.

Sincerely yours,

Peggy Butler, Supervisor
Business Education

APPENDIX C

RAW DATA

Please check how often you perform the following duties:

Regu- larly	Some- times	Never	
			<u>GENERAL OFFICE DUTIES</u>
<u>26</u>	<u>12</u>	<u>4</u>	Open the office
<u>17</u>	<u>18</u>	<u>7</u>	Straighten the reception area
<u>10</u>	<u>11</u>	<u>21</u>	Select magazine subscriptions
<u>24</u>	<u>10</u>	<u>8</u>	Order supplies
<u>28</u>	<u>14</u>	<u>0</u>	Act as Receptionist
<u>34</u>	<u>6</u>	<u>2</u>	Screen callers
<u>31</u>	<u>10</u>	<u>1</u>	Make appointments
<u>37</u>	<u>5</u>	<u>0</u>	Give appropriate information to patients
<u>34</u>	<u>6</u>	<u>2</u>	Discuss physician's fees with patient
<u>17</u>	<u>18</u>	<u>7</u>	Compose letters
<u>5</u>	<u>12</u>	<u>25</u>	Make physician's travel arrangements
<u>9</u>	<u>11</u>	<u>22</u>	Keep physician's personal records
<u>17</u>	<u>19</u>	<u>6</u>	Make introductions
<u>34</u>	<u>8</u>	<u>0</u>	Deliver oral or written messages
<u>19</u>	<u>21</u>	<u>2</u>	Escort patients to physician's office or examining room
<u>28</u>	<u>9</u>	<u>5</u>	Organize office routine
<u>15</u>	<u>8</u>	<u>19</u>	Supervise other clerical employees
			List any others you feel important

DICTATION IN THE OFFICE

<u>3</u>	<u>4</u>	<u>35</u>	Take and transcribe shorthand note
<u>0</u>	<u>5</u>	<u>37</u>	Take shorthand dictation over the telephone
<u>0</u>	<u>3</u>	<u>39</u>	Take shorthand notes of meetings and conferences
<u>11</u>	<u>8</u>	<u>23</u>	Transcribe from a recorder Make: _____

Regu- larly	Some- times	Never	
			<u>TELEPHONE</u>
34	6	2	Answer the telephone
4	2	36	Operate the switchboard
27	10	5	Transfer calls
27	5	10	Record telephone messages
31	7	4	Screen incoming calls
36	4	2	Place local calls
26	14	2	Place long distance calls
10	2	30	Compare record of long distance calls with monthly statement
33	6	3	Keep directory of frequently called numbers
			<u>OFFICE MACHINES</u>
4			Operate manual typewriter
24			Operate standard electric typewriter
15			Operate Selectric typewriter
15			Operate self-correcting typewriter
5			Operate automatic typewriter
2			Operate mimeograph machine
1			Operate spirit duplicator
41			Operate copier (Xerox, etc.)
26			Operate 10-key
19			Operate printing calculator
			Other _____
			<u>FILING</u>
32	8	2	Prepare folders and guides
32	5	5	Prepare documents for filing
37	5	0	Locate and retrieve documents from the files
22	7	13	Maintain record of materials taken from files
28	10	4	Revise files to keep them current
19	8	15	Maintain index files
6	3	33	Maintain "tickler" file
14	8	20	Maintain physician's personal files
			File by the following method:
36			Alphabetic
11			Numeric
3			Diagnostic
8			Other: <u>Color code</u>

*

*16 filed under two methods

Regu- larly	Some- times	Never	<u>MAIL</u>
<u>25</u>	<u>15</u>	<u>2</u>	Sort incoming mail
<u>24</u>	<u>15</u>	<u>3</u>	Open incoming mail
<u>18</u>	<u>19</u>	<u>7</u>	Attach pertinent information to the incoming mail
<u>15</u>	<u>10</u>	<u>17</u>	Make filing or calendar notation on mail
<u>28</u>	<u>13</u>	<u>1</u>	Sign for packages, registered mail, etc.
<u>28</u>	<u>11</u>	<u>3</u>	Prepare letters and packages for mailing

OFFICE BOOKKEEPING AND BANKING

<u>26</u>	<u>10</u>	<u>6</u>	Handle petty cash
<u>31</u>	<u>9</u>	<u>2</u>	Accept payments from patients
<u>33</u>	<u>7</u>	<u>2</u>	Prepare receipts
<u>31</u>	<u>8</u>	<u>3</u>	Maintain patients' ledger
<u>31</u>	<u>8</u>	<u>3</u>	Send statements to patients
<u>19</u>	<u>14</u>	<u>9</u>	Make bank deposits
<u>15</u>	<u>5</u>	<u>22</u>	Keep checkbook
<u>3</u>	<u>2</u>	<u>37</u>	Sign checks
<u>8</u>	<u>3</u>	<u>31</u>	Reconcile bank statement
<u>8</u>	<u>1</u>	<u>33</u>	Prepare financial statements
<u>13</u>	<u>2</u>	<u>27</u>	Prepare payroll
<u>10</u>	<u>1</u>	<u>31</u>	Prepare quarterly income tax, withholding, and FICA reports

INSURANCE FORMS COMPLETED

<u>23</u>	<u>12</u>	<u>7</u>	Private insurance forms
<u>16</u>	<u>11</u>	<u>15</u>	Blue Cross
<u>22</u>	<u>14</u>	<u>6</u>	Blue Shield
<u>4</u>	<u>2</u>	<u>36</u>	Health Maintenance Organs (HMO's)
<u>1</u>	<u>1</u>	<u>40</u>	Dental care
<u>1</u>	<u>0</u>	<u>41</u>	Visual Care
<u>22</u>	<u>10</u>	<u>10</u>	Group insurance forms
<u>20</u>	<u>6</u>	<u>16</u>	Workers' compensation
<u>26</u>	<u>6</u>	<u>10</u>	Government sponsored plans (Medicare, Medicaid)
<u>16</u>	<u>17</u>	<u>9</u>	CHAMPUS
<u>7</u>	<u>3</u>	<u>32</u>	FEHB
			Other:

Regu- larly	Some- times	Never
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TYPING

22	11	9	Business correspondence
16	15	11	Form letters
13	13	16	Form paragraphs and fill-in information
2	1	39	Minutes of meetings or conferences
6	11	25	Personnel forms
6	11	25	Physician's itinerary
4	9	29	Manuscripts for articles written by the physician
0	2	40	Spirit masters
0	3	39	Stencils
			Medical Records, reports and forms which include:
10	10	22	case histories
5	5	32	discharge summaries
5	2	35	operation reports
8	2	32	pathology reports
6	8	28	consultation reports
10	8	24	physical examination
10	8	24	patient history
3	3	36	surgical report
3	2	37	admission reports
2	2	38	hospital admission forms
4	4	34	pre-admission forms
7	5	20	patient index cards
6	4	32	patient transfer forms
4	4	34	nursing home admission
2	3	37	admission and discharge register
16	10	16	welfare forms
0	3	39	autopsy reports
0	3	39	birth records
1	8	33	death records
9	5	28	medical lab reports
6	2	34	tissue reports

Other:

Regu- Some-
larly times Never

CLINICAL PRACTICES

<u>14</u>	<u>13</u>	<u>15</u>	Prepare examination room
<u>14</u>	<u>15</u>	<u>13</u>	Prepare patient for examination
<u>5</u>	<u>7</u>	<u>30</u>	Prepare patient for X-ray
<u>4</u>	<u>6</u>	<u>32</u>	Prepare patient for EKG
<u>7</u>	<u>17</u>	<u>18</u>	Take and record temperature and blood pressure
<u>3</u>	<u>13</u>	<u>26</u>	Take and record pulse and respiration
<u>11</u>	<u>10</u>	<u>21</u>	Assist with collection, labeling, and delivery of urine and blood
<u>12</u>	<u>13</u>	<u>17</u>	Clean examination rooms
<u>10</u>	<u>4</u>	<u>28</u>	Perform basic sterilization techniques
			List others not mentioned:
<u>1</u>	<u>0</u>	<u>0</u>	Hemocult,
<u>1</u>	<u>0</u>	<u>0</u>	Stool slides
<u>1</u>	<u>0</u>	<u>0</u>	Give injections
<u>1</u>	<u>0</u>	<u>0</u>	Run film
<u>1</u>	<u>0</u>	<u>0</u>	Remove casts and sutures

PLACE OF EMPLOYMENT:

How long have you worked in this position?

0 Hospital

1 yr. to 32 yrs. Average - 5.3 yrs.

4 Clinic

What is your approximate typing speed?

34 Physicians' Office

50 to 75 (Av. - 59 wpm.)

3 Other Labs

Do you take shorthand?

Yes 13 No 29

Total: 41

If so, is it required?

Yes 1 No 41

Is a knowledge of medical terminology
important to the performance of your job?

Yes 38 No 4

23 Absolutely necessary

19 Helpful to know

0 Not necessary at all

TRANSCRIPTIONISTS' QUESTIONNAIRE

1. How long have you worked as a medical transcriptionist? 1 to 15 years (average - 6 years)
2. Have you taken additional training in your field? (correspondence, internship program, in-house training, etc.) Yes - 28; No - 11
3. What previous positions have you held? _____
4. Have you taken a course in medical terminology or did you learn it on the job? on the job - 14 course - 25
5. Minimum typing speed required for your position? 50 to 60 wpm.
6. Yes No Do you complete a log sheet to indicate work completed? 34 5
- Yes No Do you punch a time clock? 25 14
- Yes No Do you chart your own work? 14 25
- Yes No Is it charted by someone such as a medical records clerk? Yes 0
7. TYPE OF DICTATION SYSTEM
30 Centralized
10 Individual recorder
5 Other loop
8. IS YOUR PRODUCTION COUNTED IN
4 units per day
5 pages per day
22 lines per day
0 keystrokes per day
.5 minutes per day
3 other deadline
9. DO YOU OPERATE A
0 Standard Electric typewriter
6 Selectric Typewriter
17 Correcting Typewriter
13 Automatic Typewriter
10. REPORTS AND FORMS TYPED:
- | | |
|---|---|
| <u>35</u> case histories | <u>10</u> Other: X-ray interpret. |
| <u>34</u> discharge summaries | <u>8</u> Progress notes |
| <u>3</u> pathology reports | <u>6</u> Emerg. Room notes |
| <u>34</u> consultation reports | <u>6</u> EEG's |
| <u>35</u> physical examinations | <u>4</u> Evaluations |
| <u>30</u> surgical reports | <u>3</u> Minutes of meetings |
| <u>32</u> admission reports | <u>2</u> Intern logs |
| <u>3</u> preadmission forms | <u>1</u> Doctor's certification reports |
| <u>1</u> patient index cards | |
| <u>0</u> nursing home admission | |
| <u>0</u> admission and discharge register | |
| <u>4</u> autopsy reports | |
| <u>5</u> birth and death records | |
| <u>4</u> patient transfer forms | |

APPENDIX D

MEDICAL PRACTICES SURVEYED

MEDICAL PRACTICES SURVEYED

Speciality	Number
General Practice	17
Pediatrics	3
Cardiology	3
Colon And Rectal	2
Internal Medicine	2
Orthopedics	2
Radiology Laboratory	2
Neurology	2
Urology	2
Obstetrics and Gynecology	1
Pathology Laboratory	1
Surgical	1
Dermatology	1
Immunology	1
Eyes, Ears, Nose and Throat	1

VITA

Peggy Ruth Butler

Candidate for the Degree of

Master of Science

Thesis: TASKS PERFORMED BY MEDICAL SECRETARIES

Major Field: Occupational and Adult Education

Biographical:

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Professional Experience: Secretary, Colorado Consumer Corporation, 1959; bookkeeper, Fort Smith Chair Company, 1959-60; secretary, Commercial National Bank, 1960-62; instructor, Business Education Department, Oklahoma State Tech, 1968-70; supervisor, Business Education Department, Oklahoma State Tech, 1970-80. Member of Oklahoma Technical Society and Higher Education Alumni Council of Oklahoma.