



DALMOR

MEDICAL ADMINISTRATION TRAINING INSTITUTE
A DIVISION OF DALY MORGAN & ASSOCIATES

Building 7, Parc Nicol, 3001 William Nicol Drive,

Bryanston

Private Bag X138, Bryanston, 2021

Gauteng, South Africa

Tel: 011 548 7400 / Fax: 086 683 8805

email: info@dalmor.co.za

website: www.dalmor.co.za

Medical Administration: The Practice Manager and Medical Secretary Agenda

1. The roles and responsibilities of the medical receptionist

- a. Clerical duties
- b. Petty cash
- c. Customer Service
 - i. Communication
 - ii. Assertiveness
 - iii. Listening Skills
 - iv. Handling rude or impatient callers
 - v. Dealing with difficult patients in a practice

2. Medical Office Administration

- a. Appointment Scheduling and Diary Management
- b. Patient Etiquette
 - i. Telephone
 1. Answering calls
 2. Making calls
 3. Placing calls on hold
 4. Taking messages
 - ii. Voicemail
 1. Voicemail Greetings
 - iii. Email
 1. Use an accurate subject line
 2. Keep paragraphs short and concise



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3. Avoid excessive CCs and BCCs
4. Avoid caps locks

3. Patient Notes and Records

- a. POPI and PAIA Act
 - i. Requests for Access
 - ii. Medical Records
 - iii. Social Media

4. Medical Terminology

5. Billing Administration

- Patient Information and Medical Aid Details
- Correct Coding
 - Procedure/item code
 - Rejected claims
 - ICD-10 coding
 - Primary Diagnosis and code
 - Secondary Diagnosis and code
 - External cause codes
 - Unspecified and default codes
 - Why are rules necessary
- Split Billing vs Balance Billing
- PMBs

6. Payments

- Medical Aid Payments
- Private Patients
- Unpaid Accounts
- Journals

7. Financial Administration

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- Legal and Ethical Aspects of handling unpaid accounts
- When to handover to a Debt Collection Company

8. Age Analysis and Month-End

9. Legal and Professional Responsibilities

- a. National Health Act
- b. Occupational Health and Safety Act
- c. Patients Constitutional Rights

10. Basic conditions of Employment in your Medical Practice