ILLINOIS VALLEY COMMUNITY COLLEGE

COURSE OUTLINE

DIVISION: Workforce Development

COURSE: DLA 1216 Dental Administrative Assistant

Date: Spring 2020

Credit Hours: 1

Prerequisite(s):   Admission to the Dental Assisting Program

Delivery Method: ☒ **Lecture**   **1 Contact Hours** (1 contact = 1 credit hour)

☐ **Seminar**   **0 Contact Hours** (1 contact = 1 credit hour)

☐ **Lab**   **0 Contact Hours** (2-3 contact = 1 credit hour)

☐ **Clinical**   **0 Contact Hours** (3 contact = 1 credit hour)

☐ **Online**

☒ **Blended**

Offered: ☒ **Fall**   ☐ **Spring**   ☐ **Summer**

CATALOG DESCRIPTION:
This course emphasizes telephone techniques, appointment control, recall system management and insurance form generation and tracking. Financial records, withholding taxes, collection of accounts and payment of bills is studied. Inventory, ordering and receipt of supplies is also studied.

GENERAL EDUCATION GOALS ADDRESSED

[See last page for Course Competency/Assessment Methods Matrix.]

Upon completion of the course, the student will be able:

[Choose up to three goals that will be formally assessed in this course.]

☐ To apply analytical and problem solving skills to personal, social, and professional issues and situations.

☒ To communicate successfully, both orally and in writing, to a variety of audiences.

☐ To construct a critical awareness of and appreciate diversity.

☒ To understand and use technology effectively and to understand its impact on the individual and society.

☐ To develop interpersonal capacity.

☐ To recognize what it means to act ethically and responsibly as an individual and as a member of society.

☐ To recognize what it means to develop and maintain a healthy lifestyle in terms of mind, body, and spirit.

☐ To connect learning to life.

EXPECTED LEARNING OUTCOMES AND RELATED COMPETENCIES:

[Outcomes related to course specific goals. See last page for more information.]

Upon completion of the course, the student will be able to:

1. **Demonstrate a basic understanding of business ethics and dental jurisprudence.**
   1.1. Understand the definition and classifications of law in relation to dentistry and the important terms involved with litigation.
   1.2. Discuss crimes and torts with regard to the standard of care in the dental office.
   1.3. Understand the dental practice act.
   1.4. Discuss professional standards that dental assisting uses including accreditation, certification, and licensure.
   1.5. Explain various types of consent.
   1.6. Understand managed care and risk management programs as they relate to dentistry.
   1.7. Understand the legal responsibilities of a dental practice and list business office activities that could lead to potential litigation.
   1.8. Identify 12 steps in making ethical decisions.
2. **Ensure the completeness and accuracy of all patient dental records and protect their confidentiality in patient management.**
   2.1. Describe reception room techniques, the role of the receptionist, and the importance of an appealing reception area.
   2.2. Discuss contents of an office policy and design an office policy statement.
   2.3. Explain marketing techniques used in dentistry.
   2.4. Discuss records management systems in a dental office
   2.5. Identify different categories of records that are maintained in an office.
   2.6. Discuss HIPAA and how to implement HIPAA regulations in the dental office record management system.
   2.7. Discuss the importance of maintaining accurate clinical records.
   2.8. Identify various types of records required by the Occupational Safety and Health Administration (OSHA) that must be maintained in a dental office.
   2.9. Identify various types of employee records.

3. **Demonstrate a basic understanding of maintenance and retention of business records.**
    3.1. Discuss the importance of records management, both paper and electronic, and the benefit of keeping dental practice records readily available.
    3.2. Describe the basic steps for preparing records for filing and the importance of cross-referencing, retrieval, and record retention.
    3.3. Discuss the various classifications of filing systems including basic alphabetical indexing rules.
    3.4. Discuss the storage and care of electronic files.
    3.5. Discuss the equipment and storage of supplies necessary for both the paperless and paper storage of files.
    3.6. Discuss the importance of managing workstation records effectively and list several tips for successful records management.
4. **Demonstrate a basic understanding of financial reporting for the dental office.**
    4.1. Understand the importance of internal financial controls and daily checks and balances in a dental office.
    4.2. Identify different types of financial reporting methods based on type of practice, number of employees and office size.
    4.3. Interpret the financial policy for the dental office, including discount standards, third-party payment options and fee schedules.
    4.4. Determine the daily, weekly, monthly and annual reports necessary to maintain day-to-day operations.
    4.5. Analyze dental practice productivity by reviewing the scheduling, patient cancellation, and procedure reports.
    4.6. Evaluate the P&L statement, daily balance sheets and annual budget for future forecasting.
    4.7. Recognize the importance of effective communication with and making informed recommendations to the dentist/dental employee
5. **Demonstrate a basic understanding of accounts receivable in the dental office.**
    5.1. Distinguish between accounts receivable and accounts payable.
    5.2. Determine an effective financial policy.
    5.3. Understand different payment methods.
    5.4. Establish how, when and where to introduce treatment plan fees.
    5.5. Confirm the steps of posting a payment.
    5.6. Interpret accounts receivable reports and know when to run them.
    5.7. Classify the stages of billing and collections for a dental practice.
    5.8. Communicate effectively to collect outstanding and delinquent payments.
    5.9. Recognize how financial policy, effective communication, appropriate patient payment options, patient retention and patient compliance with treatment plan affect dental office profitability
6. **Demonstrate a basic understanding of human resource (HR) fundamentals for the dental office.**
    6.1. Analyze and plan for current and future dental office human resource needs.
    6.2. Develop clear job descriptions.
    6.3. Understand legal issues related to planning, recruitment, hiring, benefits, compensation, performance review, delegating duties, termination, and employee records management.
    6.4. Refine the interviewing and hiring process.
    6.5. Interpret employee benefit and compensation plans.
    6.6. Properly maintain employee records.

6.7. Manage staff orientation, staff training and performance reviews.
6.8. Recognize the importance of a legally sound employee handbook/policy.
7. Demonstrate basic understanding of inventory control systems and supply ordering.
    7.1. Identify three types of dental supplies.
    7.2. Describe various types of inventory systems.
    7.3. Discuss establishing an inventory system.
    7.4. Discuss the factors involved in maintaining an inventory supply, including a technique for receiving supplies.
    7.5. Discuss the storage of hazardous materials.
8. Demonstrate a basic understanding and purpose of Recall or Re-care systems.
    8.1. Describe the purpose of a recall/re-care system and why patients need to understand the importance of the system.
    8.2. Identify different types of recall/re-care systems.
    8.3. Explain how to establish a recall/re-care system.

MAPPING LEARNING OUTCOMES TO GENERAL EDUCATION GOALS

[For each of the goals selected above, indicate which outcomes align with the goal.]

Goals	Outcomes
First Goal	
To communicate successfully, both orally and in writing, to a variety of audiences	2.2, 2.9, 3.2, 4.5, 4.7
Second Goal	
To understand and use technology effectively and to understand its impact on the individual and society.	2.4, 3.1, 4.1, 4.2, 4.3, 4.4, 5.9, 6.7, 8.2

COURSE TOPICS AND CONTENT REQUIREMENTS:
   I. Business ethics and dental jurisprudence.
      A. Classifications of law in relation to dentistry and related terms
         i. civil law
         ii. criminal law
         iii. lawsuit
         iv. plaintiff
         v. defendant
         vi. fact witness
         vii. expert witness
      B. Crimes and torts
         i. Misdemeanor
         ii. Felony
         iii. Standard of care
         iv. Negligence
         v. Malpractice
      C. The dental practice act
         i. Review process

        ii. Patient of record

        iii. Assignment

        iv. Supervision

  D. Professional standards of dental assisting

        i. Accreditation

            1. Commission on Dental Accreditation (CODA)

        ii. Certification

            1. American Dental Association (ADA)

        iii. licensure

  E. Types of consent

        i. Informed Consent

        ii. Express Consent

        iii. Implied Consent

        iv. Informed Refusal

  F. Managed Care

        i. Cost-containment system

        ii. Dental insurance

        iii.

  G. Legal responsibilities of a dental practice and business office activities leading to potential litigation

        i. Risk management programs

        ii. Abandonment

        iii. Fraud

        iv. Records management

        v. Defamation of character

        vi. Negligence

        vii. Invasion of privacy

        viii. Good Samaritan law

        ix. Americans with Disabilities Act

        x. Computer security

  H. Identify steps in making ethical decisions

        i. Identify ethical issue

        ii. Gather and review important facts or information

        iii. List alternatives

        iv. Evaluate each alternative using

            1. Ethical principals

            2. Codes

            3. Laws

            4. Regulations

        v. Make decision choosing best alternative

        vi. Act on decision

II. Patient dental records

  A. Patient confidentiality

  B. Understanding patient's needs

        i. Maslow's hierarchy of needs

        ii. Client-centered therapy

        iii. Locus of control

  C. Barriers to patient communication

        i. Nonverbal cues

1. Nervousness
2. Defensiveness
3. Touching
4. Openness
5. Embarrassment
D. Improving verbal images to allay fears
   i. Phrases that promote successful patient management
   ii. Be positive
E. Special needs and inherent rights of patients
   i. recognize abuse
   ii. physically challenged
   iii. disabled
F. Reception room techniques
   i. Role of the receptionist
      1. First person to greet patient
   ii. Appealing reception area
      1. Bright, cheerful, pleasantly decorated
   iii. Waiting patients
      1. Inform of delays
      2. Indicate wait time
      3. Do not make excuses
G. Contents of an office policy
   i. Philosophy
   ii. Office hours
   iii. Appointment control
   iv. Payment policy
   v. Hygiene
   vi. Attitude toward children
   vii. Auxiliary use
   viii. Infection-control policy
   ix. Quality assurance
   x. Staff continuing education
   xi. Office data
      1. Design an office policy statement
H. Marketing techniques used in dentistry
   i. Legalized in 1977
   ii. Website
      1. Vital information of practice
      2. Services
      3. Educational materials
      4. Games, crafts, health tips
      5. Email address for interaction
      6. Online appointment scheduling
   iii. Internal marketing
   iv. External marketing
   v. Newsletters
I. Records management systems in a dental office
   i. Information management

J. Categories of records
- i. Vital records
- ii. Important records
- iii. Useful records
- iv. Nonessential records

K. HIPAA and how to implement HIPAA regulations
- i. Protected health information (PHI)
- ii. ADA provided tools for implementation
    1. Notice of Privacy Practices
    2. Acknowledgement of Receipt of Notice of Privacy Practices
    3. Business Associate Contract Terms

L. Accurate clinical records
- i. Patient's chart
- ii. Narrative of patients care
- iii. Legally admissible
- iv. Third-party benefit carriers
- v. Verification of tax rendered for IRS purpose
- vi. Forensic odontology

M. Occupational Safety and Health Administration (OSHA) requirements
- i. Medical records
- ii. Copies of employee hepatitis B vaccination records
    1. Declination form
- iii. Exposure incidence forms
- iv. Follow-up documents for exposure incidents
- v. OSHA training records

N. Employee records
- i. Application for employment
- ii. Employment agreements
- iii. Merit evaluation forms
- iv. Health forms and medical records
- v. Federal employment Eligibility Verification forms
    1. I-9

III. Maintenance and retention of business records.
- A. Preparing records for filing
    - i. Inspecting
    - ii. Indexing
    - iii. Coding
    - iv. Sorting
    - v. Storing
    - vi. Cross referencing
    - vii. Retrieval
- B. Records retention
- C. Classification of filing systems
    - i. Alphabetical
    - ii. Geographical
    - iii. Numerical
    - iv. Subject
    - v. Chronological

D. Electronic files
    i. Storage
    ii. Care of recordable media
E. Equipment
    i. Lateral file
    ii. Open-shelf filing
    iii. Card file
F. Storage supplies
G. Managing workstation records effectively

IV. Inventory control systems and supply ordering.
A. Types of supplies
    i. basic categories
        1. expendable
        2. nonexpendable
        3. capital
B. Selecting supplies
C. Designing an inventory system
    i. Capital equipment inventory control
D. Expendable and non expendable supplies inventory control
E. Automated inventory systems
F. Manual inventory systems
    i. Card system
    ii. Alphabetical list
G. Maintaining the inventory system
    i. Identify reorder points
    ii. Determining supply quantity
    iii. Receiving supplies
    iv. Receiving credit
    v. Back-ordered supplies
    vi. Purchase orders
    vii. Storage of supplies
    viii. Inventory evaluation

V. Recall or Re-Care systems
A. Keeping patients informed
B. Types of recall/re-care systems
    i. Advanced appointment systems
    ii. Telephone recall systems
    iii. Mail recall System
    iv. Telecommunication recall system
        1. Email
        2. Text messaging
C. Establishing a recall system
    i. Electronic recall
    ii. Follow up care
    iii. Purging the system

VI. Market his/her skills
A. Preparing for the job search
    i. Planning and organizing
    ii. Hard skills

            iii.   Soft skills
- B. Five important questions
    - i. Where have I been?
    - ii. Where am I now?
    - iii. Where am I going?
    - iv. How am I going to get there?
    - v. How will I know when I have arrived?
- C. Self assessment
    - i. Critical analysis
    - ii. Identifying personal assets and liabilities
- D. Marketing your skills
    - i. Supporting your skills in marketing
        1. Administrative assistant
        2. Clinical assistant
        3. Dental hygienist
- E. Job priorities
    - i. Determining your career philosophy
    - ii. Determining your worth to a practice
- F. Potential areas of employment
    - i. Private practice
    - ii. Institutional dentistry
    - iii. Insurance office
    - iv. Research
    - v. Dental manufacturers
    - vi. Management of consulting firms
    - vii. Teaching
- G. Where do you begin to find employment opportunities?
    - i. School placement
    - ii. Newspaper advertisements
    - iii. Employment agencies
    - iv. Professional organizations and journals
    - v. Internet
    - vi. Personal networks
- H. Preparing employment data
    - i. Preparing a letter of application
        1. Arouse interest
        2. Describe your skills and abilities
        3. Request and interview
    - ii. Contacting an office by telephone
    - iii. Creating a resume
        1. Personal data
        2. Professional summary
        3. Education
        4. Work experience
    - iv. Optional areas
        1. Affiliations and activities
        2. References

  I. Completing the job application form
  J. Preparing for an interview
    i. The personal interview
    ii. Other formats of interviewing
      1. Working interview
      2. Virtual interview
    iii. Concluding the interview
    iv. Follow up after the interview
    v. Regular self evaluation on the job
  K. Hints for success as a part of the dental team
    i. Learn names of staff members
    ii. Listen attentively
    iii. Establish meaningful social friendships
    iv. Use a notebook and calendar to record important activities and procedures
    v. Observe office hours
    vi. Use judgment when working overtime and taking breaks
    vii. Do not flaunt your education and abilities
    viii. Seek honest performance evaluations
    ix. Maintain office policies
    x. Be yourself
  L. Asking for a raise
    i. Questions to consider prior
  M. Job termination
  N. Attitudes for continued success

INSTRUCTIONAL METHODS:

- Lecture
- Classroom discussion*
- computer assignments-Eaglesoft*
- Visual aids – videos*
- Computers*
- Demonstration
- Exams and quizzes
- Program software tutorials*
- Hands on computer work*
- Communicating with live patients

INSTRUCTIONAL MATERIALS:

- Text books
  - *Practice Management for the Dental Team*, 8th Edition, Finkbeiner/Finkbeiner, Mosby, 2016
  - *Practice Management for the Dental Team WORKBOOK*, 8th Edition, Finkbeiner/Finkbeiner, Mosby, 2016
- Elsevier Evolve Resources
- Eaglesoft Practice Exercises
- Dentalcare.com

STUDENT REQUIREMENTS AND METHODS OF EVALUATION:
A grade of "C" is required for graduation from the Dental Assisting Program. The following grading scale will be used as a guide in determining the final grade for this course:

A= 90-100
B= 80-89
C= 70-79
D= 60-69
F= 0-59

Course Competency/Assessment Methods Matrix

(Dept/# Course Name)	Assessment of Student Learning	Article Review	Case Studies	Group Projects	Lab Work	Oral Presentations	Pre-Post Tests	Quizzes	Written Exams	Artifact Self Reflection of Growth	Capstone Projects	Comprehensive Written Exit Exam	Course Embedded Questions	Multi-Media Projects	Observation	Writing Samples	Portfolio Evaluation	Real World Projects	Reflective Journals	Applied Application (skills) Test	Oral Exit Interviews	Accreditation Reviews/Reports	Advisory Council Feedback	Employer Surveys	Graduate Surveys	Internship/Practicum /Site Supervisor Evaluation	Licensing Exam	In Class Feedback	Simulation	Interview	Written Report	Assignment
Assessment Options																																
Assessment Measures – Are direct or indirect as indicated. List competencies/outcomes below.	Direct/ Indirect	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	I	I	I	I	D	D						
Communicate effectively and professionally with patients of all ages				X	X	X		X	X			X	X		X	X				X			X	X	X	X	X	X	X	X		X
Assure the completeness and accuracy of all dental records and protect their confidentiality				X	X	X		X	X			X	X		X	X				X			X	X	X	X	X	X	X	X		X
Schedule appointments and maintain control of the appointment book				X	X	X		X	X			X	X		X	X				X			X	X	X	X	X	X	X	X		X
Demonstrate a basic understanding of filing systems and record retrieval				X	X	X		X	X			X	X		X	X				X			X	X	X	X	X	X	X	X		X
Demonstrate basic understanding of inventory control				X	X	X		X	X			X	X		X	X				X			X	X	X	X	X	X	X	X		X

Demonstrate a basic understanding of prepaid dental care plans and generate claim forms			X	X	X		X	X			X	X		X	X				X			X	X	X	X		X	X	X	X		X
Demonstrate a basic understanding of bookkeeping procedures used in dentistry			X	X	X		X	X			X	X		X	X				X			X	X	X	X		X	X	X	X		X
Demonstrate a basic understanding of methods that can be used to market her skills			X	X	X		X	X			X	X		X	X				X			X	X	X	X		X	X	X	X		X