DIVISION: Workforce Development

COURSE: DLA 1216 Dental Administrative Assistant

Date: Spring 2023

Credit Hours: 1

Complete all that apply or mark “None” where appropriate:

Prerequisite(s): Admission to the Dental Assisting Program

Enrollment by assessment or other measure? ☐ Yes ☑ No

If yes, please describe:

Corequisite(s): None

Pre- or Corequisite(s): None

Consent of Instructor: ☐ Yes ☑ No

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)

Offered: ☑ Fall ☐ Spring ☐ Summer

CATALOG DESCRIPTION and IAI NUMBER (if applicable):

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.
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 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

EVALUATION OF STUDENT ACHIEVEMENT:
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:

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\begin{align*}
A &= 90-100 \\
B &= 80-89 \\
C &= 70-79 \\
D &= 60-69 \\
F &= 0-59
\end{align*}
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INSTRUCTIONAL MATERIALS:
Textbooks
Practice Management for the Dental Team WORKBOOK, 9th Edition, Finkbeiner/Finkbeiner, Mosby, 2020

Resources
• Elsevier Evolve Resources
• Dentalcare.com
• Ascend Academic Tutorial
LEARNING OUTCOMES AND GOALS:
Institutional Learning Outcomes

1) Communication – to communicate effectively;
2) Inquiry – to apply critical, logical, creative, aesthetic, or quantitative analytical reasoning to formulate a judgement or conclusion;
3) Social Consciousness – to understand what it means to be a socially conscious person, locally and globally;
4) Responsibility – to recognize how personal choices affect self and society.

Course Outcomes and Competencies
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.**
   6.2. 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.