



Western Technical College

# 10508120 Dental Office Management

## Course Outcome Summary

### Course Information

<b>Description</b>	Prepares dental auxiliary students to manage telephones, appointments, recall systems, and inventory. Students also develop the skills needed to process accounts receivable and payable, collections, and third party reimbursements.
<b>Career Cluster</b>	Health Science
<b>Instructional Level</b>	Associate Degree Courses
<b>Total Credits</b>	2
<b>Total Hours</b>	36

### Textbooks

*Practice Management for the Dental Team*. 9th Edition. Copyright 2019. Finkbeiner, Betty. Publisher: Elsevier Science. **ISBN-13**: 978-0-323-59765-4. Required.

### Success Abilities

1. Live Responsibly: Foster Accountability
2. Refine Professionalism: Act Ethically
3. Refine Professionalism: Improve Critical Thinking
4. Refine Professionalism: Practice Effective Communication

### Program Outcomes

1. DA-1 year: Demonstrate professional behaviors, ethics, and appearance.
2. DA-1 year: Perform dental office business procedures.

### Course Competencies

1. **Operate business equipment and software programs.**  
Assessment Strategies

- 1.1. by operating business equipment and software programs in the school/dental office setting
- 1.2. in a series of exercises provided by the instructor

#### **Criteria**

*You will know you are successful when*

- 1.1. you operate the equipment/software proficiently.
- 1.2. you select the correct equipment for a given task.

#### **Learning Objectives**

- 1.a. Describe how to operate and maintain business equipment in the dental practice.
- 1.b. Differentiate between computer hardware and software components and describe their functions.
- 1.c. List the features of a dental software system and discuss software extensions.
- 1.d. Describe how to arrange for service and repair of business equipment.

## **2. Employ telephone management techniques.**

#### **Assessment Strategies**

- 2.1. by managing incoming/outgoing telephone calls in a laboratory/classroom setting
- 2.2. by taking telephone messages in a role-play

#### **Criteria**

*You will know you are successful when*

- 2.1. you utilize telephone courtesy techniques to place incoming/outgoing telephone calls.
- 2.2. you answer the phone promptly.
- 2.3. you greet the patient pleasantly.
- 2.4. you identify the practice and yourself.
- 2.5. you ask how you may help the caller.
- 2.6. you ask for permission before putting patients on hold.
- 2.7. you organize thoughts before placing outgoing calls.
- 2.8. you write telephone messages that are complete and accurate.

#### **Learning Objectives**

- 2.a. Describe the importance of the telephone as the primary communication contact between patients and the office.
- 2.b. Describe the characteristics which create a positive impression when answering the telephone.
- 2.c. Be familiar with the different types of telephone messaging systems, on-hold systems, and conference calling.
- 2.d. List the items of information that should be included on a telephone message form.
- 2.e. Identify the steps involved in handling complaints.
- 2.f. Discuss the difference between face to face and voice to voice conversation.
- 2.g. List the procedures used for handling incoming/outgoing telephone calls.
- 2.h. Receive, transmit and record telephone messages.

## **3. Manage appointments.**

#### **Assessment Strategies**

- 3.1. by completing appointment scheduling exercises in the laboratory/classroom setting
- 3.2. by completing a daily schedule

#### **Criteria**

*You will know you are successful when*

- 3.1. appointment schedules include entries for a variety of dental procedures.
- 3.2. appointment schedules include allowances for routine office hours.
- 3.3. appointment schedules include allowances for emergency procedures.
- 3.4. appointment schedules include notations of meetings, vacations, and holidays.
- 3.5. appointment entries are accurate and complete.
- 3.6. daily schedule has all required items filled in completely.

#### **Learning Objectives**

- 3.a. List the priorities and considerations in scheduling appointments.
- 3.b. Describe the importance of time blocks/units in maintaining an efficient appointment system.
- 3.c. Describe the procedure for recording/scheduling appointments, completing appointment cards, and

- sequential appointment scheduling.
- 3.d. List the basic rules for all appointment entries and identify the sequence in which these entries should be made.
- 3.e. List the screening priorities for handling and appointing emergency patients.
- 3.f. Describe scheduling considerations of special patients.
- 3.g. Describe the process of handling late patients and no-shows.
- 3.h. Describe how to maintain a system to reschedule changed appointment times.
- 3.i. Describe the role in appointment confirmation and technology available to make confirmations.
- 3.j. Describe the importance of maintaining a patient call list.
- 3.k. Discuss the functions of a daily schedule and describe where it should be posted.
- 3.l. List the process of posting the daily schedule, maintaining the recall system, and multiple room scheduling.
- 3.m. Identify the records that should be gathered in preparation for the patient's visit.
- 3.n. Demonstrate making appointments in an appointment book or computerized program.
- 3.o. Demonstrate making appointment card entries.

#### **4. Manage recall systems.**

##### **Assessment Strategies**

- 4.1. by managing recall system

##### **Criteria**

*You will know you are successful when*

- 4.1. recall system accurately calculates the month of recall for a patient.
- 4.2. recall system includes a list of services included in a recall visit.
- 4.3. recall system includes a method for notifying recall patients.

##### **Learning Objectives**

- 4.a. Describe the process in managing a recall system.
- 4.b. List the services included in a recall visit.
- 4.c. Describe the types of recall systems.
- 4.d. Demonstrate calculating the month of recall for a patient.
- 4.e. Identify the methods utilized to notify recall dental patients.

#### **5. Manage inventory and supplies.**

##### **Assessment Strategies**

- 5.1. in an oral, written or graphic assessment

##### **Criteria**

*You will know you are successful when*

- 5.1. you examine inventory systems.
- 5.2. you evaluate the strengths of systems.
- 5.3. you identify recommendations for the improvement of systems.

##### **Learning Objectives**

- 5.a. Explain the processes for managing dental office supply inventory.
- 5.b. Define rate of use, order point, purchase order, packing slip, invoice, credit invoice, and back order.
- 5.c. Describe the necessary steps in tracking and managing supply quantity needs of the office.
- 5.d. Define supply inventory terms: shelf life, rotating stock, and storage considerations.
- 5.e. List the steps (manual or electronic) in supply ordering and inventory control.
- 5.f. List the guidelines for ordering supplies.
- 5.g. Describe how to maintain equipment warranties and service repairs.
- 5.h. Describe the necessity of security precautions for in-office drug inventory and dispensing.
- 5.i. Describe strategies for saving the office money on supplies, including bulk quantity purchases, automatic shipments, and contract purchases.

#### **6. Process dental records.**

##### **Assessment Strategies**

- 6.1. using the simulated clinical chart

##### **Criteria**

*You will know you are successful when*

- 6.1. you transfer information from the scenario to the dental form completely and accurately.
- 6.2. you enter the patient information accurately.
- 6.3. you make a notation about a serious illness or allergy.
- 6.4. records are signed and dated.
- 6.5. records utilize standard English and correct usage, punctuation, spelling, and abbreviations.
- 6.6. records show correct use and spelling of professional/technical terminology.

#### **Learning Objectives**

- 6.a. Identify the types of records maintained in a dental office.
- 6.b. Category various types of dental office records.
- 6.c. Distinguish between active and inactive.
- 6.d. List the components of a clinical record.
- 6.e. Explain the rules for data entry on patient records.
- 6.f. Describe types of filing systems.
- 6.g. Apply basic alphabetical indexing rules.
- 6.h. Describe ownership and confidentiality of patient records and the legal implications.

### **7. Process accounts receivable and collections.**

#### **Assessment Strategies**

- 7.1. by processing accounts receivable
- 7.2. by completing daily reports
- 7.3. using information as provided by instructor

#### **Criteria**

*You will know you are successful when*

- 7.1. accounts receivable exercises are complete and accurate.
- 7.2. accounts receivable system includes data concerning all account transactions.
- 7.3. accounts receivable system includes a system for statement generation.
- 7.4. daily reports provide a summary of all practice activity on a day-to-day basis.
- 7.5. daily reports are complete and accurate.

#### **Learning Objectives**

- 7.a. Describe accounts receivable bookkeeping and state the difference between earnings and income.
- 7.b. List the parts of an accounts receivable bookkeeping system and describe the purpose of each.
- 7.c. Describe the procedure for entering payments.
- 7.d. Describe the process utilized to produce walkout statements.
- 7.e. Describe the steps involved in preparing a daily report.
- 7.f. Describe the steps involved in preparing a bank deposit.
- 7.g. Describe the method utilized to complete financial arrangements.
- 7.h. Describe the methods of patient payment for dental treatment.
- 7.i. Identify the principles of a credit policy.
- 7.j. Discuss the FCC regulations for making collection calls and describe how to make collection calls within these constraints.
- 7.k. Describe the process involved in producing statements for dental services.
- 7.l. Describe the procedure for collection of past due accounts.
- 7.m. Describe the use of collection agencies and small claims court to collect overdue accounts.
- 7.n. Describe the use of a treatment plan in the case presentation and in making financial arrangements with patients.

### **8. Process accounts payable.**

#### **Assessment Strategies**

- 8.1. by completing accounts payable
- 8.2. using information as provided by instructor

#### **Criteria**

*You will know you are successful when*

- 8.1. accounts payable exercises are complete and accurate.
- 8.2. accounts payable exercises include a system for paying bills and maintaining expense documentation.

- 8.3. accounts payable exercises include an annual expense summary.

**Learning Objectives**

- 8.a. Define accounts payable bookkeeping.
- 8.b. Define the term overhead as it pertains to the dental practice.
- 8.c. Differentiate between fixed and variable overhead expenses associated with the dental practice.
- 8.d. Be familiar with the most commonly used methods of accounts payable.
- 8.e. Discuss the seriousness and consequences of embezzlement.
- 8.f. Describe standard taxes withheld from employee paycheck and the importance of sound record keeping for all payroll procedures.
- 8.g. Describe the steps involved in producing an annual expense summary.

**9. Complete third party forms.**

**Assessment Strategies**

- 9.1. by completing third party forms
- 9.2. using information as provided by instructor

**Criteria**

*You will know you are successful when*

- 9.1. third party forms are complete and accurate.
- 9.2. third party forms contain accurate categories of dental services (CDT).
- 9.3. third party forms reflect patient and carrier payment responsibilities.

**Learning Objectives**

- 9.a. Define managed care and describe alternative payment plans with regard to the dental practice.
- 9.b. Describe insurance and other third-party payment claims processing.
- 9.c. State how patient and carrier information should be gathered and organized.
- 9.d. Explain the parts of a dental claim form.
- 9.e. Differentiate between a pre-treatment estimate and a reimbursement claim.
- 9.f. Explain the CDT codes of current dental terminology and the process for utilizing them on insurance claims.
- 9.g. Describe the coordination of benefits procedure.
- 9.h. Describe Medicaid and Medicare dental benefits.
- 9.i. Complete a standard insurance form using a computer or manual system.
- 9.j. Describe the use and components of a one-write system.
- 9.k. Describe the benefits of electronic claims processing.