

**PALOMAR COLLEGE**  
**COURSE OUTLINE OF RECORD FOR**  
**DEGREE CREDIT COURSE**

\_\_\_\_\_ Transfer Course  X  A.A. Degree applicable course  
(check all that apply)

**COURSE NUMBER AND TITLE:** DA 65 Dental Practice Management

**UNIT VALUE:** 2

**MINIMUM NUMBER OF SEMESTER HOURS:** 48

**BASIC SKILLS REQUIREMENTS:** Appropriate language skills

**ENTRANCE REQUIREMENTS:**

**PREREQUISITE:** Admission to the Dental Assisting Program

**COREQUISITE:** None

**RECOMMENDED PREPARATION:** None

**SCOPE OF COURSE:**

Reception and care of the patient in the dental office, communication skills, telephone techniques, appointment scheduling, dental records (charting health and dental history), filing, recalls, bookkeeping, accounts receivable and accounts payable, purchasing inventory, principles of and use of insurance forms and collections. *Graded only*

**SPECIFIC COURSE OBJECTIVES:**

1. Identify and describe at least three different roles within the business office.
2. Identify at least three major areas of responsibility assigned to the secretarial dental assistant.
3. Explain the need for good communication skills and identify at least five of the steps to becoming a better listener.
4. Compare open-ended and closed-ended questions and describe the special uses of each.
5. Explain the proper way to greet patients.
6. Identify the characteristics which create a positive impression when answering the telephone.
7. Identify the items of information to be included on a telephone message form.
8. Identify at the steps involved in handling complaints.
9. Explain key factors in appointment book selection.
10. Identify the basic rules for all appointment book entries and identify the sequence in which these entries should be made.
11. Explain how to schedule appointments for emergency patients, recall patients, children and elderly patients.
12. Identify the special steps that must be taken when scheduling with an RDAEF.
13. Explain how to maintain a system to reschedule changed appointment times.

14. Explain the function of the daily schedule, describe where it should be posted due to HIPPA, identify the records that should be gathered, and the steps to be taken in preparation for the patients visit.
15. Explain the steps that should be taken to protect patient records in accordance to HIPPA requirements, to facilitate their retrieval and to describe at least three types of filing systems.
16. Explain the use of color coding and other filing aids to speed records filing and retrieval.
17. Identify anatomical and geometric tooth diagrams and describe how the tooth surfaces are represented on each.
18. Explain the history and charting portions of a patient's chart from data supplied.
19. Identify three types of recall systems and calculate the month of recall.
20. Explain accounts receivable bookkeeping and state the difference between earnings and income.
21. Explain the parts of an accounts receivable bookkeeping system and describe the purpose of each
22. Accurately explain charges, payments and adjustment on a pegboard bookkeeping system.
23. Explain how these functions would be managed on a computerized system
24. Explain how to make specialized account entries and adjustments
25. Explain the difference between UCR and Schedule of Benefits
26. Identify and describe the other limitations which influence how much the carrier will pay and how much the patient must pay.
27. Explain how patient and carrier information should be gathered and organized.
28. Explain the use of the ADA procedure codes in filing claims
29. Explain the use of an estimate sheet in case presentations and in making financial arrangements.
30. Identify the following payment plans: payment at the time of treatment, statements, divided payments and office budget plan.
31. Explain the conditions under which a Truth in Lending forms is required.
32. Explain the FCC regulations for making collection calls and describe how to go about making a collection call within these constraints.
33. Explain the use of collection agencies and small claims court collect overdue accounts..
34. Identify the guidelines for ordering and stocking supplies.
35. Explain accounts payable bookkeeping
36. Identify the payroll taxes which are deducted from an employee's earning and those which the employee must pay, and how to do a payroll.
37. Explain the steps involved in writing checks and in reconciling the checkbook and bank statement.

**CONTENT IN TERMS OF SPECIFIC BODY OF KNOWLEDGE:**

1. The secretarial Dental Assistant
  - A. HIPPA requirements in the dental office
  - B. Communication skills
    1. Open\closed ended questions
    2. Good listening
    3. Words
    4. Greeting the patient
    5. The telephone
      - a. Use proper greetings
      - b. Messages
      - c. Placing a call
      - d. Personal calls
    6. Handling Complaints
      - a. You are not the target
      - b. Express regret
      - c. Restate the problem

- d. Ask questions
    - e. Assure action
    - f. Follow through
  - 7. The patient registration form
    - a. Section 1 - date regarding the person
    - b. Section 2 - date regarding specific information
    - c. Section 3 - data regarding the family
- 2. Appointment Control
  - A. Outlining the Appointment Book
    - 1. Routine hours
    - 2. Buffer periods
    - 3. Meetings
    - 4. Holidays
  - C. Rules for Appointment Book/Computer Entries
    - 1. Legible/complete/pencil
    - 2. Length of time
    - 3. Changes are erased
    - 4. Order in appointment book of entry
  - D. Appointment Scheduling
    - 1. Procedure
    - 2. Time needed
    - 3. Specialized scheduling
    - 4. Emergency appointments
    - 5. Brief appointments
    - 6. Series of appointments
    - 7. Children
    - 8. Older patients
    - 9. Recall
    - 10. Expanded function dental auxiliary
    - 11. Changed appointments
    - 12. Failed appointments
    - 13. Short-notice appointments
    - 14. Advance appointment preparation
  - E. Daily Schedule
  - F. Computerized Scheduling
- 3. Records Management
  - A. Introduction to Records Management
    - 1. Retrieval
    - 2. Protection
    - 3. Retention
  - B. Filing Systems
    - 1. Alphabetical
    - 2. Numerical
    - 3. Cross-reference
    - 4. Chronological
  - C. Types of Practice Records
    - 1. Business records
    - 2. Patient records
      - a. Ownership of patient records
      - b. Transfer of patient records
  - D. Filing Aids

1. File folders
  2. Identification label
  3. Color coding
  4. File guide/folder ratio
  5. Out guides
  - E. Computerized record management
    1. Accounts Receivable
    2. Alpha search
      - a. type first several letters of patient's last name
      - b. display: name & account number
      - c. select correct name-type account number
  - F. Active/inactive files
    1. Primary
    2. Secondary
    3. Storage
  - G. Alphabetical filing
    1. Divisions into units
      - a. Nothing comes before something
      - b. Prefixes
      - c. Abbreviated prefixes
      - d. Hyphenated names
      - e. Titles and degrees
      - f. Seniority
      - g. Married women
4. Charting
- A. Charting the examination
    1. Red/blue
    2. Service entries
    3. Abbreviations
    4. Charting errors
    5. Entering fees
  - B. Cavity classification
5. Preventative Recall and Written Communications
- A. What is a recall?
    1. Oral cancer screening
    2. Exam hard and soft tissues
    3. Home care
    4. Follow up for previous treatment
    5. Early detection of developmental problems
    6. Patient education
  - B. How to notify/HIPPA requirements
    1. Telephone
    2. Mail
    3. Computerized
    4. Manual recall
      - a. Advance appointment
      - b. List by month
      - c. Instant reference
      - d. Complete recall
  - C. Calculating recall period
  - D. Processing recall notice

- E. Scheduling recall
  - F. Letter writing
    - 1. Plan ahead
    - 2. Simple
    - 3. Proper terminology
    - 4. Spelling
    - 5. Block style
6. Accounts Receivable Bookkeeping
- A. The Parts
    - 1. Patient account records
    - 2. The audit trail
    - 3. Charge slip
    - 4. Receipts and walk-out statements
    - 5. The daily journal
    - 6. Summaries
  - B. Pegboard
    - 1. Daily journal
    - 2. Ledger cards
    - 3. Receipt and charge slips
    - 4. Steps in using
  - C. Computerized System
    - 1. Set up
    - 2. Posting
    - 3. End of the day
  - D. Adjustments
    - 1. Discounts
    - 2. N.S.F. checks
    - 3. Payment from collection agency
    - 4. Payment from insurance carrier
    - 5. Payment by credit card
    - 6. Stop payment
  - E. Bank Deposits
  - F. Change Fund
  - G. Check Endorsements
  - H. Deposit slips
7. Dental Insurance
- A. Patient information
  - B. Plan information
  - C. Methods of payment
    - 1. U.C.R.
    - 2. Schedule of benefits
  - D. Limitations
    - 1. Deductible
    - 2. Co-insurance
    - 3. Exclusions
    - 4. Maximums
  - E. Claim Form
    - 1. Pre treatment estimate
    - 2. Assignment of benefits
    - 3. Release of information
    - 4. Signature on file

- 5. Coordination of benefits
  - F. ADA Procedure Codes
  - G. Steps in Completing Claims
    - 1. Before 1st visit
    - 2. 1st visit
    - 3. End of appointment
    - 4. File claim
    - 5. Follow up on claims
- 8. Operations of Basic Equipment
  - A. Phone
  - B. Answering machine
  - C. Voice mail
  - D. Fax machine
  - E. Copy machine
  - F. Credit cards
  - G. Computer
    - 1. word processor
    - 2. printer
- 9. Collections and Payment Plans
  - A. Making Financial Arrangements
    - 1. Gather financial data
    - 2. Prepare estimate
    - 3. Reaching an agreement
  - B. Payment Plans
    - 1. Time of treatment
    - 2. Monthly statement
    - 3. Divided payment
    - 4. Office budget
    - 5. Truth in lending
  - C. Accounts Receivable Report
  - D. Preventive Account Control
  - E. Collection follow-through
    - 1. Efforts
    - 2. Calls
    - 3. Letters
    - 4. Skip tracing
    - 5. Collection agencies
    - 6. Small claims court
- 9. Inventory Control and Purchasing
  - A. Card-file inventory
  - B. Inventory control card
  - C. Card tray and indexing
  - D. Metal file signals
  - E. Red flags
  - F. How to use
  - G. Reorder point
  - H. Ordering supplies
  - J. Stocking fresh supplies
- 10. Accounts Payable Bookkeeping
  - A. Preparing to pay bills
  - B. Expense documentation

- C. Depreciation schedule
- D. Annual expense summary
- E. Payroll
  - 1. Circular E, the employer's tax guide
  - 2. Payroll records
  - 3. Government reports
  - 4. Payroll deductions
  - 5. Social security
  - 6. Federal unemployment tax
  - 7. Workers Compensation
- F. Petty cash fund
  - 1. Replenishing
- G. Check writing
  - 1. Accurate and complete
  - 2. Authorized signature only
  - 3. Mistakes
  - 4. Check the bank balance
- H. Pegboard check writing
  - 1. The pegboard
  - 2. Check register
  - 3. Pegboard checks
- I. Reconciling a bank statement
  - 1. Compare canceled check with check listed on statement

**REQUIRED READING:**

Gaynor, L. The Administrative Dental Assistant, 1st edition. Philadelphia: W. B. Saunders, 2000.

**SUGGESTED READING:**

Torres, H. and A. Ehrlich. Modern Dental Assisting. 7th edition. Philadelphia: W.B. Saunders, 2003.

**REQUIRED WRITING:**

Writing assignments are at the discretion of the instructor.

**OUTSIDE ASSIGNMENTS:**

**Students are expected to spend a minimum of three hours per unit per week in class and on outside assignments, prorated for short-term classes.**

**INSTRUCTIONAL METHODOLOGY:**

**Check all that apply:**

- lecture
- laboratory
- lecture-laboratory combination
- directed study

**DISTANCE LEARNING:**

**This course may be offered as a distance learning course and meets Title 5 regulations 55370, 55372, 55374, 55376, 55378, and 55380.**

Yes \_\_\_ No x

**If yes, check all that apply:**

- Television Course (Video one-way, e.g. ITV, video cassette, etc.)
- Online Course (Text one-way, e.g. newspaper, correspondence, electronic file, etc.)
- Two-Way Video Conferencing (Two-way interactive video and audio)
- One-Way Video Conferencing (One-way interactive video and two-way interactive audio)
- Computer Assisted Instruction (A specialized form of mediated instruction relying primarily on student access to information and prepared lessons or teaching materials through a computer terminal, but not under immediate supervision of a qualified instructor.)

**GRADING POLICY AND STANDARDS** (include methods of determining whether the stated objectives have been met by students):

Grading policy is in compliance with college standards described in the Palomar College catalog and the faculty manual.

- 100-90% = A
- 89-80% = B
- 79-70% = C
- 69-60% = D
- 59-50% = F

Test value	=	30%
Final exam value	=	40%
Computer assignments	=	<u>30%</u>
		100%

**IS COURSE REPEATABLE FOR REASON(S) OTHER THAN DEFICIENT GRADE?**

Yes \_\_\_ No x Number of times course may be taken for credit: 1

If yes, identify specific provision of Title 5 Division 2 section(s), 55761-55763 and 58161 which qualifies course as repeatable:

**CONTACT PERSON: Denise Rudy X 2573**

**SIGNATURES ON FILE:**