

## **DENT 57 - Dental Office Management**

### **Scope and objectives as required by American Dental Association and CA Code of Regulations**

- A. Course and professional requirements
- B. Administrative assistant
  1. Assisting a patient in completion of an acquaintance form, registration form, and insurance information form, seeing that all questions are answered in detail
  2. Update of patient medical history and folder
  3. Clinical record
  4. Importance of obtaining a signature on file for release of information and assignment of benefits, and HIPAA privacy procedures
  5. Proper storage of patient and business records
  6. Role of administrative assistant and plan financial arrangements when a fee presentation is being made
  7. Patient record transfer
  8. Responsibility of the business assistant in disease prevention
  9. Basic records that must be maintained for Occupational Safety and Health Act (OSHA), such as the Regulatory Compliance Manual
- C. Marketing techniques used In dentistry
  1. Importance of continuing care patient
  2. Contents of an office policy
  3. Office policy in small groups
  4. Internal and external marketing
  5. Office newsletter
  6. Forms of acceptable advertising
- D. Bookkeeping fundamentals
  1. Earnings and income and how these affect all dental health team members
  2. Preparation of an accounting entry to record treatment provided, fees charged, payments received, balance due, and issuing of a walk-out statement/receipt
  3. Difference between a credit, debit, and adjustment
  4. Difference between accounts receivable and accounts payable systems
  5. Accounting entry to record treatment provided or services rendered, charges, balance due, and issuing of a walk -out statement
  6. Accounting entry to record treatment provided, charges, payment received, balance due, and walk-out statement/receipt
  7. Accounting entries of insurance payments, bulk check payments, and itemized payments
  8. Importance of EOB to insure proper credit with insurance payments
  9. Pegboard accounting and computerized transactions
  10. Three part superbill can be used
  11. Management of payment received
  12. Editing and voiding a transaction
  13. Four basic office policies
  14. Four most common payment plans offered in the dental office
  15. Non-itemized, semi-itemized, and itemized statements
  16. Three rules for preventive account control
  17. Federal Fair Credit Reporting Act, Federal Truth is Lending Act, Federal Equal Credit Opportunity Act, and the Federal Fair Debt Collection Practices Act
  18. Collection letter for an account 60 days overdue

19. Collection calls to a patient whose account is 120 days overdue. If payment is not received by promised date, follow through with another phone call or automatically turn the account over to a collection agency
  20. Role of a collection agency and the advantages and disadvantages
- E. Computer use in dental office management
1. Terminology used in computer technology
  2. History of computers in business
  3. Benefits of the computer in a dental office, DENTRIX SOFTWARE
  4. Importance of backup
  5. Editing and voiding transactions
  6. Use of the computer for dental office management reports and purposes; billing, insurance, aging, close of day
  7. Computer bookkeeping assignments for patient files, charges, payments, insurance, and appointments
  8. Dentrix Office Manager to update and change fee schedules
  9. Insurance coverage tables
- F. Dental health insurance
1. Insurance fraud, and bonding of office staff
  2. Major types of dental health care programs including: Delta Dental Plans, commercial programs companies, closed panel clinics, Health Maintenance Organizations, and government-sponsored programs
  3. Major factors affecting the dental health insurance coverage, such as, UCR/Schedule of Allowance, coinsurance/copayment, deductibles, exclusions, annual maximums and direct payments
  4. Importance of efficient handling of dental health insurance claims and how this can affect the financial health of the practice
  5. Information needed for good organization for claims management
  6. Use of E-Claims and patient privacy
  7. Folders included in the "Master File System" for storing active insurance claims, and state why it is necessary to keep track of claims as they move through the various steps
  8. Printing of insurance reports, DENTRIX
  9. Importance of determining patient eligibility and predetermination of benefits
  10. Three other terms that are commonly interchangeable with the term "predetermination"
  11. Ten major areas and fifty-eight sections of information found on the standard ADA Uniform claim form
  12. Use of CDT publication
  13. Questions asked on the ADA form and why you believe this information is important
  14. Non-duplication of benefits and relation to treatment plan estimates
  15. "Release of information" and "assignment of benefits" and why the patient is asked to sign each of these and signature on file
  16. System of procedure codes known as the "Uniform Code of Dental Procedure and Nomenclature" and why it is of benefit to the dental office to use these codes
  17. Purpose of the "dual coverage clause" found in some dental policies, and the procedure for filing claims in such cases
- G. Expenses
1. Four basic steps in organizing the storage of supplies
  2. Purpose of keeping a well organized inventory file for both supplies and equipment
  3. Necessary information, establish the reorder point and reorder quantity for a given supply
  4. Method of follow-up on "back orders"
  5. Supply requisition and purchase orders
  6. How the amount of a supply budget is determined

7. Computerized inventory management and ordering of supplies
  8. Four points to be checked before calling for repair service on a piece of equipment
- H. Disbursement
1. Procedures for management of
    - a. accounts payable
    - b. C.O.D. deliveries
    - c. petty cash fund
    - d. marketing and group practices
  2. Writing a check and making the necessary checkbook/check register entries
  3. Pegboard check writing and payroll companies
  4. Restrictive endorsement and a blanket endorsement for a check and which is the most desirable for the dental office
  5. Procedure for a stop payment order
  6. Proper way to handle a Non-Sufficient-Fund (N.S.F.) check and how to make the necessary adjustments on the office bookkeeping system
  7. Reconciling the monthly bank statement for the dental office
  8. Preparation of a monthly summary of income and disbursement
  9. Federal and state payroll taxes that are withheld from payroll checks and those requiring a matching contribution by the employer; and complete a payroll assignment for a hourly and semimonthly employee
  10. Preparation of the employer's quarterly tax return for the federal and the state governments
- I. Group practices/Inc.
1. Advantages
  2. Disadvantages