Dental Office Administration
Dental Office Administration

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For Everett and Simon
Advancements in the field of dentistry are constant. As clinical advancements grow, there is an increasing need for educated professionals in the administrative area of the dental field. The oral health of the public is much too important to be left up to personnel who are not formally trained in the dental field. Dental office administrators are dental professionals who receive the formal training required. The formally trained dental administrative assistant has become a critical component in the delivery of quality oral health care. As an administrative member of the dental profession, you are embarking on an exciting and challenging career.

**OBJECTIVE**

The primary objective of this text is to make available a comprehensive resource on dental office administration to the dental profession and the administrative and clinical staff who affect the success of a dental office. As you progress through the chapters, you will find that all the information reflects current information and developments in the dental industry.

**ORGANIZATION**

This textbook is organized into five parts.

Part 1 provides an introduction to the dental administration profession by providing insight into the dental office from the business perspective. This section explores the characteristics of a successful dental administrator. A thorough definition of the role of the dental administrator and explanation of the importance of the position give the reader a complete understanding of the qualifications and expectations of the position. A comprehensive review of the components of a successful dental office, such as office layout, team members and their roles, and the specialties found in the dental profession, provides students with the knowledge required for success in the profession. This section also covers the ethical and legal knowledge necessary for dental administrators and further outlines the responsibilities that they have to patients in the dental practice as mandated by HIPAA in the United States and PIPEDA in Canada. Section 1 is rounded out with the importance of asepsis in the clinical and administrative dental environment and the responsibilities of the dental administrator in this regard.

Part 2 begins with a dental terminology section as a necessary resource for the reader to ensure correct pronunciation and usage of dental terminology in the
industry. The main focus in the section is on communication in the dental office and the importance of correct and accurate communication. Emphasis is on the development of successful verbal and nonverbal communication skills and their effect on patient relationship development. Effective telephone and written communication skills are brought together in this section to emphasize this very important area of the dental administrator role.

Part 3 introduces the critical features of the role of the dental office administrator: patient record management, patient development and maintenance, appointment management, office policies and procedures, filing procedures, inventory, and technology. For success in the dental practice to occur, the dental office administrator must grasp the fundamental skills of establishing and maintaining patient relationships. The reader will become well-versed in methods used in the dental office to achieve a balanced patient flow such as recall systems, telephone reminders, and written reminders.

Appointment management is introduced, and readers are given real-life scenarios to challenge them. Providing insight into how to deal with late patients, no-shows, walk-ins, and emergencies will enhance the confidence to effectively deal with patients for any reader new to the dental industry. An understanding of dental office policies and the role they play in the development of a successful practice outlines other management responsibilities that dental office administrators must be familiar with. This section ends with a look at dental office filing and inventory procedures, and an in-depth look at computerized practice management. An overview of a computerized practice management program is given with applications for the reader to get a feel for the real thing.

Part 4 addresses the financial management aspects to dental office administration. Patient billing and payment is a large part of dental administration. One chapter is devoted to the collection of funds from patient by various means, with the bulk of the attention being given to insurance companies and the forms required for filing a dental claim, as well as the different types of dental plans available. Accounts receivable and accounts payable are both given equal time to provide a comprehensive lesson in collecting monies and paying expenses in the dental office. Banking procedures and payroll functions are outlined in the final two chapters of this section. In smaller dental clinics, the dental office administrator becomes the one staff member who is responsible for the financial aspects of the practice. A full overview of these procedures provides the reader with essential knowledge for management of a dental office.

Part 5 is devoted to the career considerations of the dental office administrator. As students begin the transition from student to employee, tips for making that transition as smooth and successful as possible are provided.

**FINAL NOTE**

In all chapters, Web sites and references used are current. These are included to substantiate the content and to encourage self-study by the reader. Self-education is essential for professional growth in the dental industry, especially if your career has just begun!

It is hoped that this book will facilitate the learning and knowledge necessary for success in the role of the dental office administrator. As the program you are in prepares you to be a respected professional of the dental industry, the knowledge this book provides will stay with you as you enter the world of dentistry and enhance the face of dental office administration.

**Geraldine Irlbacher-Girtel, BScN, RN, MEd**

**Guy S. Girtel, DDS**
This User's Guide helps you take full advantage of the Dental Office Administration text. Each chapter offers helpful features that enable you to quickly master new concepts and put your new skills into practice.

A number of features are included in this text to facilitate learning.

Learning Objectives provide clear goals to ensure mastery of the content presented in the chapter, and Key Terms are listed at the beginning of each chapter and are boldfaced at first use within each chapter to introduce the student to the basic vocabulary of dental office administration. These key words are also listed and defined in the glossary at the back of the book.
Canadian Practice boxes offer unique content related to dental administration in Canada.

Legal Tips are tips on protecting patients’ privacy while performing day-to-day tasks with medical records and on basic legal responsibilities of dental office administrators.

Legal Tips

Discussing patient information where other patients can overhear can sometimes happen unintentionally in the dental office. Use the following points to minimize this from happening:

- Use a private area out of the range of hearing of others to discuss patient information.
- Use a low voice when speaking with patients in public areas.
- Never address a patient by his or her full first and last name.
- Never discuss patients outside of the dental office with other people.

What If boxes are hypothetical scenarios in the dental office that require the reader to apply knowledge to resolve a realistic issue or problem.

A patient has arrived for an appointment and has expressed concern to you about the dental assistant wearing gloves during treatment. The patient feels that this is offensive since she does not have any diseases that the dental assistant should be concerned with contracting. How do you respond?

It is important to educate the patient on the meaning of “standard precautions” and what is involved with this process, particularly, how these precautions protect the dental patient and staff members. The patient needs to be aware that every patient is treated the same; that is, all members of the clinical staff wear gloves for each treatment performed on each patient.

The Workplace Hazardous Materials Information System (WHMIS) is a classification system established by the Canadian Center for Occupational Health and Safety (http://www.ccohs.ca/oshanswers/legis/whmis.html) that groups chemicals that have similar properties. In the dental office, there are many materials-risk you may come across through stocking, disposing of, or using that fall under any one of the categories outlined by the WHMIS. There are six classes of hazardous materials in this system, some of which subdivide to include other classes.

The figure below shows all five classes and the symbol for each class. For each class, the symbol is the symbol that can be found on the container of the material. For example, cleaning supplies, dental materials, and disposable masks often come across through stocking, disposing of, or using that fall under any one of the classes. The symbol for each class is the symbol that can be found on the container of the material. For example, cleaning supplies, dental materials, and disposable masks often come across through stocking, disposing of, or using that fall under any one of the classes. The symbol for each class is the symbol that can be found on the container of the material.

- Division 1
  - Use a low voice when speaking with patients in public areas.
  - Never address a patient by his or her full first and last name.
  - Never discuss patients outside of the dental office with other people.

- Division 2
  - Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.
  - Material will burn or catch fire at normal temperatures. The symbol is a “T” with an exclamation point at the bottom. Materials such as natural gas, gasoline, and paints are flammable.

- Division 3
  - Use a private area out of the range of hearing of others to discuss patient information.
  - Use a low voice when speaking with patients in public areas.
  - Never address a patient by his or her full first and last name.
  - Never discuss patients outside of the dental office with other people.

- Division 4
  - Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.
  - Material will burn or catch fire at normal temperatures. The symbol is a “T” with an exclamation point at the bottom. Materials such as natural gas, gasoline, and paints are flammable.

- Division 5
  - Use a low voice when speaking with patients in public areas.
  - Never address a patient by his or her full first and last name.
  - Never discuss patients outside of the dental office with other people.

- Division 6
  - Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.
  - Material will burn or catch fire at normal temperatures. The symbol is a “T” with an exclamation point at the bottom. Materials such as natural gas, gasoline, and paints are flammable.

Poisonous and Infectious Materials

These materials cause serious harm to a person. There are three subdivisions of materials in this class, all of which are covered in the dental office. They are part of this division. These materials are identified by the “skull and crossbones” symbol. The symbol looks like these “” joined together in a circle.

Dangerous Reactive Material

Most materials classified as dangerously reactive are extremely reactive if they are not handled properly because they can react quickly and easily. An example of this type of material would be aluminum chloride.

The symbol for dangerously reactive materials is a picture of a test tube with lines coming out of the tube surmounted by a letter “” inside a circle.

Combustible Material

The symbol for combustible materials can cause severe burns if it comes in contact with skin or other human tissue and can usually be burned through lighting and other material as well. The symbol for combustible materials is a white cylinder with a flame inside a circle, which indicates the material is flammable or combustible.

Oxidizing Material

The symbol for oxidizing materials is a “” with flames on top of it. Oxidizers are materials that assist in the fire process by providing oxygen. An oxidizer can be a gas, a liquid, or a solid.

Flammable and Combustible Material

The symbol for flammable material is a picture of a cylinder surrounded by a circle. Any material that is normally a gas and contained in a cylinder is considered combustible material. Combustible gas is considered dangerous because it is under pressure if not handled properly. It is classified in this category. The symbol is a “T” with an exclamation point at the bottom. Materials such as natural gas, gasoline, and paints are flammable.

Reactive Material

The symbol for reactive materials is a picture of a test tube with lines coming out of the tube surmounted by a letter “” inside a circle.

Division 1

Use a low voice when speaking with patients in public areas.

Division 2

Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.

Division 3

Use a private area out of the range of hearing of others to discuss patient information.

Division 4

Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.

Division 5

Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.

Division 6

Use the workplace hazardous materials information system (WHMIS) to aid in the identification of hazardous materials.

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When a new patient telephones the dental office to schedule an appointment, there is specific information that is necessary to obtain from the patient to establish a patient record before setting an appointment. Some dental offices may require only name and contact phone number as the information necessary for scheduling the appointment. Other offices may require more information to establish a patient record. A new patient telephone call information sheet is a very useful tool in establishing a patient record. This is a form that is kept in an accessible place to collect the necessary patient information, such as name, address, phone number, date of birth, and insurance information. Having this information prior to the patient appointment allows you to mail the proper forms to the patient for completion prior to the appointment and verify insurance information. The form can also be used to collect information such as the referral source of the patient. If a current patient has referred a new patient, this is an opportunity to send a thank you card or other acknowledgment to the referring patient. Finally, documenting when the new patient demographic and health history forms were sent can also be verified on this form. When the patient arrives for the scheduled appointment, the form can then be filed in the patient chart, as it is written documentation of the initial contact with the patient. Figure 8-7 is an example of what the new patient telephone call information sheet may look like. This form can be modified to fit the requirements of the dental office.

Tips From the Dentist are tips from the perspective of the dentist regarding optimal practices for dental administrators.

**Administrative Tips** are tips on how to perform some administrative task in the dental office.

**Tip FROM THE DENTIST**

One of the most distressing things that I see when I am leading my team to provide a caring, safe, and stress-free environment for our patients is when members of the team don’t understand or appreciate their role in maintaining the flow in the dental office. For instance, if the dental office administrator fails to be ready and able to work at the opening of the office, someone must take the place of that individual to answer the phone and greet patients as they arrive. If the person filling in is the dental assistant, then he or she is no longer available to help the dentist or attend to patients’ needs in the operatory. The responsibility of every employee in the dental office is not to the dentist or patient alone but to every member of the dental team.

Each member of the team must understand and appreciate the role of all team members and how each person is integral in maintaining an efficiently run office. Just as important, team members must be aware of how their actions affect the team. Team members may appear disorganized and incompetent when they are trying to fill in where they don’t feel comfortable; this creates a pressure-filled environment that patients can sense.

**PROCEDURE 3-1 Hand Washing**

The following steps outline a correct hand-washing procedure.

1. Remove all jewelry (rings, watches, bracelets).
2. Turn on the tap and run cool water at a medium stream. Use antimicrobial soap.
3. Lather hands, wrists, and forearms. Rub all surfaces using light pressure. Fingers should interlace. Wash each finger individually, rubbing with a back-and-forth motion with light pressure.
4. Rinse thoroughly under the running water, starting from the forearms to the fingertips.
5. Repeat the process.
6. Use a paper towel to dry your hands and forearms.
7. Use a paper towel to turn off the tap. Do not use hands to turn off the tap as the risk of recontamination to hands is greater.

Procedure boxes provide step-by-step directions on performing common office management tasks.
Checkpoint Questions are review questions interspersed throughout each chapter that allow students to check their recall of the content presented in the section just read.

Chapter Summary

Dentistry is constantly evolving. The formally trained dental office administrator will be a part of one of the most exciting times in dentistry, as new advances in dentistry appear everyday. The dental team members can make a dental practice very successful when they work together to deliver high-quality dentistry. As a dental office assistant, the value you add to the dental office by embracing the responsibilities and challenges that present themselves every day is an important resource to the dental office. The dental office needs a dental office administrator to create a smoothly run environment. As you grow professionally, your career as a dental office assistant will prove to be as exciting and steadfast as the advancements you’ll encounter in the dental profession.

Chapter Review Questions are multiple-choice questions appearing at the end of the chapter that help the student review the chapter material.

Review Questions

1. In addition to the qualities touched on in this chapter, discuss some personal qualities that you think a dental office administrator should possess and why they would be important in the dental office.
2. Describe some of your personal experiences as a patient in the dental office and think about what could have been done to make the experience different or better. If your experience was a positive one, what were the things that made it so? If your experience was negative, what could have been done differently to prevent it?
3. Review the list of dental specialties and think about which of them you would like to work for. Are there any specialties in the geographic area in which you live? If they have a Web site, can you get any more information on their office? Prepare a written response to these questions.

Multiple Choice

1. Time management is
   a. the utilization of processes that increase a person’s time efficiency.
   b. a process that occurs naturally over time.
   c. the biggest challenge faced by administrators in dental offices today.
   d. an evolving method of scheduling proficiency.

2. A common time waster in the dental office is
   a. a patient who consistently arrives late.
   b. staff who discuss personal issues during lunch hour.
   c. lengthy important telephone calls to patients.
   d. reading personal e-mails during office hours.

3. Which of the following does not contribute to professional appearance?
   a. Long, curly hair tied back.
   b. Finger nails cut to a short, active length.
   c. Shirts that are scuffed from overuse.
   d. Clean, pressed uniform.

4. A main concern for the dental office administrator should be
   a. building relationships with all employees.
   b. caring for patients and their welfare.
   c. being available for weekend work.
   d. ensuring that all employees receive their paycheck.

Web Sites

American Dental Association
http://www.ada.org/
American Dental Assistants Association
http://www.dentalassistant.org/
## Review Questions

### Multiple Choice

Select the best response for each question.

1. The spread of disease through contact with contaminated surfaces such as instruments, countertops, and handles is referred to as
   a. cross-contamination.
   b. parenteral.
   c. airborne transmission.
   d. infectious waste.

2. A pathogen is
   a. a disease caused by a biological agent such as a parasite or bacterium.
   b. waste capable of causing or transmitting an infectious disease.
   c. a virus or microorganism that causes disease.
   d. the contact with infectious material as a result of an employee’s duties.

3. Sharps are infectious materials to be disposed of in a
   a. dental material garlic can.
   b. sharps container.
   c. sterilized waste container.
   d. regulated waste container.

4. The transmission of infectious diseases from body fluids contaminated with blood is called
   a. airborne transmission.
   b. bloodborne transmission.
   c. cross-contamination.
   d. occupational exposure.

5. Biohazardous waste refers to waste such as
   a. items contaminated with saliva only.
   b. items contaminated with blood only.
   c. items contaminated with blood and saliva.
   d. all items used in the dental office.

6. The following are all examples of personal protective equipment, except
   a. gloves.
   b. mask.
   c. shoes.
   d. lab coat.

### Critical Thinking

1. One of the team members in the dental office continually brings patients’ charts to the front desk while still wearing gloves worn during treatment and has on occasion used pens and left them on the desk when finished. Is there anything wrong with this, and, if so, how would you deal with it?

2. As a dental office administrator, you will spend most of your time in the administrative areas of the dental office, so why do you need to understand asepsis procedures and controls?

3. How do you think a malpractice lawsuit might occur as a result of improper infection control techniques?

4. Why do you think it would be beneficial to patients if you were to educate them regarding infection control procedures in the dental office?

5. How is learning about hazardous materials useful to your role as a dental office administrator?

### Hands-On Activities

1. Design a fax cover page for the office you are working in.

2. Write a letter to a new patient, thanking him or her for the referral to the practice. Use the semi-block format.

### ADDITIONAL RESOURCES

Additional resources for both instructors and students are available on the book’s companion Web site at thePoint.lww.com/Girtel1e and on a disk at the back of this book. These resources include the following:

**For faculty (on Web site)**
- Test generator
- Image bank
- PowerPoint lecture slides

**For students (on disk at the back of book and on Web site [note: DENTRIX G4 practice management software available on the CD only])**
- Educational version of DENTRIX G4 practice management software (DENTRIX G4 software courtesy of Henry Schein Practice Solutions, American Fork, UT)
- DENTRIX G4 learning activities
- DENTRIX G4 practice management User’s Guide
- DENTRIX G4 practice management Installation Guide
- Quiz bank

Critical Thinking Questions help the student process and apply the chapter material through a number of thought-provoking questions.
This book was born out of a passion to teach and assist in the evolution of the dental health profession. Many people have offered encouragement, support, and ideas throughout the development of this book and contributed to it by showing their commitment to and concern for its realization. We wish to thank, in particular, those who have made exceptional contributions.

First and foremost, we would like to thank David Payne, the managing editor of this project, who provided invaluable insight and patience when necessary for the development of this textbook. His expertise and dedication were a contributing force to the completion of this book. In addition, the staff at LWW who were involved in the book development provided the support and resources necessary to generate the textbook: John Goucher, Executive Acquisitions Editor, for his enthusiasm for the book and assistance with proposal development, and Eric Branger, Managing Editor, for his assistance in the development process.

Finally, we wish to acknowledge our immediate and extended family members who all played a role with their encouragement and love during challenging times that arose during the book writing process. We wish to thank Ryan Girtel for the patience and youthful enthusiasm he displayed as the book unfolded as well as Lili, our constant writing companion. We consider our family to include the staff members of the dental office who have grown with us as we developed this book and our dental practice and evolved along with the dental profession. Most notably, we would like to thank Mrs. Nicole Paranica, who has been an unwavering friend and who believed in us and the necessity of this textbook for the dental profession.

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