



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **HLTDA306D Assist with administration in dental practice**

**Release: 1**

## HLTDA306D Assist with administration in dental practice

### Modification History

HLT07 Version 4	HLT07 Version 5	Comments
HLTDA306C Assist with administration in dental practice	HLTDA306D Assist with administration in dental practice	ISC upgrade changes to remove references to old OHS legislation and replace with references to new WHS legislation. Updated pre-requisite units. No change to competency outcome.

### Unit Descriptor

#### Descriptor

This unit of competency describes the skills and knowledge required for a dental assistant to assist the operator by managing appointments to suit the client and the organisation, to record and reconcile payments and to maintain client records

All procedures are carried out in accordance with work health and safety (WHS) policies and procedures, current infection control guidelines, Australian and New Zealand Standards, State/Territory legislative requirements and organisation policy

### Application of the Unit

#### Application

This unit applies to dental assistants who assist with administration in dental practice

It acknowledges the role of these members of the dental team to make appointments for clients and handle payments

### Licensing/Regulatory Information

Not Applicable

## Pre-Requisites

### Pre-requisite units

This unit must be assessed after successful achievement of pre-requisites:

- HLTDA303D Prepare for and assist with oral health care procedures
- HLTIN301C Comply with infection control policies and procedures
- HLTIN302C Process reusable instruments and equipment in the health care setting
- HLTWHS200A Participate in WHS processes

## Employability Skills Information

### Employability Skills

This unit contains Employability Skills

## Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in *italics* are elaborated in the Range Statement.

## Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Communicate effectively with clients and other persons	<ul style="list-style-type: none"><li>1.1 Greet clients and other visitors appropriately</li><li>1.2 Make available an appropriate environment for the client to complete medical, dental and financial details</li><li>1.3 Listen carefully and be sensitive to client and/or carer point of view</li><li>1.4 Provide information to client and/or carer appropriately and completely using language that can be easily understood</li><li>1.5 Ensure client and/or carer understands information provided to them</li><li>1.6 Show empathy and respect for client and/or carer by being polite and avoiding negative comments</li></ul>
2. Respond appropriately to enquiries from clients and visitors	<ul style="list-style-type: none"><li>2.1 Maintain personal dress and presentation</li><li>2.2 Operate <i>communication equipment</i> effectively</li><li>2.3 Respond to enquiries promptly, politely and ethically</li><li>2.4 Determine the purpose of an enquiry, the identity of the person and retrieve relevant record/s if required</li><li>2.5 Prioritise messages and record them legibly and accurately</li><li>2.6 Refer enquiries outside area of responsibility and/or knowledge to appropriate supervisor</li><li>2.7 Comply with organisation protocols for electronic communication with clients and/or carers</li><li>2.8 <i>Maintain confidentiality</i> of information relating to clients, staff and the dental practice/organisation</li></ul>

**ELEMENT****PERFORMANCE CRITERIA**

3. Allocate appointments appropriate to client and organisation requirements

- 3.1 Identify the client's *appointment requirements*
- 3.2 Agree an appointment time which meets the client's preferences and the organisation's requirements
- 3.3 *Record the appointment details* accurately and legibly using standard dental notation in the organisations appointment system
- 3.4 Provide a copy of appointment details to the client
- 3.5 Monitor appointment schedules and notify clients and the oral health care team of any necessary changes within a suitable timeframe

4. Calculate and record basic financial transactions

- 4.1 Complete petty cash vouchers accurately and account for all monies
- 4.2 Calculate correct fees
- 4.3 Apply GST where appropriate in line with identified requirements
- 4.4 Check and record legibly and accurately payments received
- 4.5 Validate cheques and credit card vouchers
- 4.6 Provide the client with a receipt

**ELEMENT****PERFORMANCE CRITERIA****5. Handle cash and record financial transactions**

- 5.1 Balance accurately monies received against records of payment in accordance with organisation policies
- 5.2 Secure cash is secured in an approved location
- 5.3 Respond to suspected breaches of security and take the appropriate action with minimum delay in accordance with organisation policies
- 5.4 Identify a record of bad debts and take appropriate action in line with office procedures
- 5.5 Follow banking procedures in accordance with organisation policies

**6. Maintain client records**

- 6.1 Remove the correct client files and attach the appropriate fees and diagnostic records
- 6.2 Place files in order of appointment
- 6.3 Enter information legibly, accurately and update as appropriate
- 6.4 File client *dental records* correctly after use
- 6.5 Maintain up-to-date, accurate, legible and complete records of laboratory work

**7. Assist with client recalls**

- 7.1 Apply knowledge of a client *recall system*
- 7.2 Mark client records with the relevant recall date as appropriate and as directed by the operator
- 7.3 Identify clients who are due for recall and notify them that an appointment is due
- 7.4 Follow-up with courtesy those clients who do not respond to a recall appointment request

## Required Skills and Knowledge

In order for a safe inference of competence to be made on this unit, the candidate must provide evidence of the following areas of skills and knowledge.

### *Essential knowledge:*

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

This includes knowledge of:

- Appointments:
  - confirmation of appointments
  - the action that must be taken for broken and/or cancelled appointments
  - the dentist's preferred work routine
  - the particular needs which clients may have for the timing of appointments
  - the relevant details that must be entered into the appointment system and the written confirmation that must be provided to the client
  - the time constraints imposed by the dental laboratory
  - the time requirements of different treatment procedures and the effect this has on appointment scheduling
  - the ways in which the scheduling of appointments may cause problems for the practice and possible methods for remedying this
- Recall appointments:
  - advantages of a recall system
  - methods used by the dental practice or the organisation to identify those clients who require either recall examination or follow-up treatment
  - methods used to follow-up clients who do not respond to recall
- Legal requirements:
  - confidentiality requirements for the recording and storage of client records
  - reasons for ensuring the confidentiality of information provided by the client
  - requirements of the Health Privacy Principles and their application to the collection of information by the dental practice or organisation
- Dental terminology:
  - abbreviations and symbols used when recording dental treatment
  - community periodontal index
  - FDI notation system used to designate the permanent and deciduous teeth during examination and charting

- Palmer notation system used to designate the permanent and deciduous teeth during examination and charting
- symbols used during charting of individual
- Handling and recording financial transactions:
  - HICAPS electronic claims and payment
  - issuing of invoices
  - itemising of client accounts using the coding system described in the Australian Schedule of Dental Services and Glossary wherever possible
  - operating a petty cash system
  - organisation policy on banking and handling of cash securely
  - recording of payments and issuing of receipts
  - the Department of Veteran's Affairs (DVA) health care program
  - the details that need to be recorded and checked for credit and/or debit cards and cheque payments
  - the different methods of payment

*Essential skills:*

It is critical that the candidate demonstrate the ability to

- Accurately calculate fees
- Assist with management of an effective appointment and recall system
- Record financial transactions in accordance with dental practice/organisation requirements
- Record, label and file forms and records in accordance with legislation and the dental practice/organisation policies
- Respond to a variety of requests for information from a range of persons

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

This includes the ability to:

- Deal with conflict
- Select and apply the procedures to perform a range of tasks; follow sequenced written instructions, record accurately and legibly client details
- Use available technology and software for recording appointments and payments
- Use interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities. It includes working with others and demonstrating empathy with callers and clients
- Use oral communication skills required to fulfil the job role as specified by the dental practice/organisation:
  - acknowledging and responding to a range of views



- active listening
- asking for clarification from caller or client
- asking questions
- negotiation
- Use literacy skills to read and follow directions, policies and procedures including:
  - infection control policies and procedures
  - WHS policies and procedures
  - practice/organisation policies and procedures
- Use numeracy skills including:
  - basic mathematical calculations such as addition, multiplication and calculations of percentages
  - handling and recording of basic financial calculations
- Use problem solving skills required include an ability to use available resources, prioritise appointments and assess the urgency of calls

## Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

*Critical aspects for assessment and evidence required to demonstrate this competency unit:*

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- Observation of workplace performance is preferred for assessment of this unit
- Consistent compliance with current NHRMC infection control guidelines, Australian Standards and legislative requirements as they relate to the dental assistant's specific job role
- Consistency of performance should be demonstrated over the required range of workplace situations

- Context of and specific resources for assessment:*
- Assessment should replicate workplace conditions as far as possible
  - Simulations may be used to represent workplace conditions as closely as possible
  - Where, for reasons of safety, access to equipment and resources and space, assessment takes place away from the workplace, simulations should be used to represent workplace conditions as closely as possible

- Method of assessment*
- Observation in the workplace
  - Evidence of essential knowledge and understanding may be provided by:
    - traditional or online (computer-based) assessment
    - written assignments/projects
  - Case study and scenario as a basis for discussion of issues and strategies to contribute to best practice
  - Questioning
  - Staff and/or client feedback
  - Supporting statement of supervisor
  - Authenticated evidence of relevant work experience and/or formal/informal learning
  - Roleplay/simulation

- Access and equity considerations:*
- All workers in the health industry should be aware of access and equity issues in relation to their own area of work
  - All workers should develop their ability to work in a culturally diverse environment
  - In recognition of particular health issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on health of Aboriginal and Torres Strait Islander people
  - Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on health of Aboriginal and/or Torres Strait Islander clients and communities

## Range Statement

The Range Statement relates to the unit of competency as a whole. It allows for different

work environments and situations that may affect performance.

*Abbreviations and symbols may include:*

- Abbreviations and symbols used when recording dental treatment
- International notation
- Palmer notation
- Symbols used to chart tooth crowns

*Communication equipment may include:*

- Telephone
- Facsimile
- Email

*Maintaining confidentiality may include but is not limited to:*

- Public environments
- Legal and ethical requirements
- Writing personal details such as medical and dental histories and consent forms
- Conversations on the telephone
- Secure location for written records
- Offering a private location for discussions
- Information disclosed to an appropriate person consistent with the responsibility of a dental assistant

*Appointment requirements may include but are not limited to:*

- Appointment requirements of the client:
  - routine examination
  - defined procedures
  - emergencies
- Special requirements of the dental practice:
  - timing requirements for different types of procedures.
  - availability of staff
- Scheduling a series of appointments

- Recording of appointment details may include:*
- Manual - appointment book
  - Electronic - computer based program
  - Appointment details include the:
    - client's name
    - client's contact details
    - procedure to be performed for that appointment
- Dental records may include but are not limited to:*
- Dental charts and dental treatment records
  - Completed medical questionnaires
  - Consent documents obtained for treatment
  - Radiographs, tracings and measurements
  - Diagnostic models
  - Photographs
  - Records of financial transactions
  - Notes made by staff following telephone conversations
  - Reports to and from referring dentists and specialists
  - Copies of correspondence relating to the client
- Recall systems may include:*
- Manual
  - Electronic

## **Unit Sector(s)**

Not Applicable