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DENTAL ASSISTANT SPECIALTY

Volume 7. Clinic Management



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Qualification Training

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Volume 7, *Clinic Management*, contains modules on processing, producing and maintaining dental reports, preparing management reports, operating instructions and official correspondence, management of financial requirements, and the evaluation of staffing requirements. This QTP is designed to enhance 5-, and 7-skill level OJT of dental assistant personnel. All eight volumes are intended to be used by trainees, trainers, supervisors, and supervisor/trainer—for conducting on-the-job (OJT) per AFI 36-2201, *Air Force Training Program*.

QTPs are designed to help you conduct and evaluate your field training. Once you begin upgrade training you're required to use the QTPs. QTPs provide continuity to the trainee's upgrade training and are divided into the following volumes: 1) *Basic Skills*; 2) *Clinical Skills - Radiology*; 3) *Clinical Skills - Chairside Assisting*; 4) *Clinical Skills - Preventive Dentistry*; 5) *Patient Administration – Procedures and Programs*; 6) *Logistics Management*; 7) *Clinic Management*, and 8) *Supervision and Training*. The QTP modules were written to assist you in preparing for and conducting training. You *must* use the QTP modules for training when either: 1) the STS task is a core task (minimum qualification for the specialty); or 2) you have identified the STS task as a requirement of the trainee's job. Each module segments the major tasks into teachable elements. Your goal is to provide enough training and guidance so trainees can do all task related steps, without assistance, while meeting local requirements for speed and accuracy. QTPs also aid OJT task certifiers in evaluating the trainee's demonstrated performance. If you have local training requirements not covered by a QTP module you *should* develop "steps in performance" and "performance checklists" that support and standardize those tasks.

Accompanying each volume of QTPs is a *qualification training progress record*. This QTP record serves as a document to record the date the trainee completes each module. Individuals in qualification/upgrade training must have this QTP progress record filed in their OJT folder. Use and annotation of this progress record are similar to current OJT documentation. When *you* are satisfied the trainee meets standards, as prescribed in the QTP performance checklist, *you* must document and initial each task completion date in column 2B of the Specialty Training Standard (STS) and the "date completed" column in the QTP progress record. If a person is being recertified on a task that is supported by a QTP you must use that module to complete the recertification process.

Typically, you will manage each module by first, training the tasks and then, evaluating performance. Your local steps in performance may vary from the method listed in the QTP module. If this is the case, you are authorized to make changes to the first half of each module, (i.e., steps in task performance); however, the "performance checklist" is considered a *standard* and cannot be altered. You may train each QTP volume/module in any sequence; however, when conducting training use an organized and methodical approach. This will reduce your training time and enhance your efforts.

When beginning any training process you should first, review the procedures in each module with the trainee. Second, direct the trainee to review the training references listed to prepare for task performance. Third, go through the steps in task performance with the trainee, allowing enough time to adequately train each step (some modules may

take longer to teach). Fourth, evaluate the trainee's work at each critical step--using the performance checklist at this point will be helpful. Fifth, evaluate the trainee's performance and provide feedback on any areas for improvement. Finally, when the trainee has successfully completed the task you must document and initial both the STS and the QTP progress record. If the trainee does not accomplish the module, conduct follow-up instruction until the trainee successfully completes the task.

The QTP project goal of the 381 TRS/XWAA, Sheppard AFB TX, is to publish a useable document for trainers and trainees. You are encouraged to write-in changes or revisions to the QTPs. A corrections/improvements letter is located on the last page of each QTP volume.

The inclusion of names of any specific commercial product, commodity, or service in this publication is for informational purposes only and does not imply endorsement by the Air Force.

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MODULE 7-1 PROCESSING AND MAINTAINING AUTOMATED DENTAL TREATMENT DATA

STS TASK REFERENCE:

4.9.1 Process and maintain automated dental treatment data

TRAINING REFERENCES:

Dental Data System – WEB (DDS-Web), User's Guide

Website: <https://www.afms.mil/afdent/topics/adacodes.htm>

EVALUATION INSTRUCTIONS:

After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist. Instruct the trainee to incorrectly input the last two AF Forms 644 and DD Forms 2322. This is necessary to test their ability to make clinic and lab productivity adjustments.

PERFORMANCE RESOURCES:

Dental Data System-Web (DDS-W)

Daily Transaction Listing (DTL)

10 completed AF Forms 644s, Record of Dental Attendance

10 completed DD Forms 2322s, Dental Laboratory Work Authorization

**STEPS IN TASK PERFORMANCE:**

1. Collect AF Forms 644 and DD Forms 2322 for input
2. Log onto DDS-W using valid password
3. From the Main Menu, select AF Form 644, then Data Entry
4. Enter data taken from each AF Form 644
5. Return to the Main Menu, select DD Form 2322, then Data Entry
6. Enter data taken from each DD Form 2322
7. Return to Main Menu
8. Select AF Form 644, then Daily Transaction List
9. Enter Start Date and End Date which the DTL should display all transactions for the period
10. Ensure data integrity; check AF 644s against the corresponding entry line
11. Identify incorrect/faulty entries
12. View questionable entries by depressing the “Select” button
13. Make necessary updates/deletions from the Clinic Transaction Update/Delete Form
14. Return to the Main Menu to verify accuracy of DD Form 2322 transactions
15. Select AF Form 2322, then Daily Transaction List
16. Enter Start Date and End Date which the DTL should display all transactions for the period
17. Ensure data integrity; check DD Form 2322s against the corresponding entry line
18. Identify incorrect/faulty entries
19. View questionable entries by depressing the “Select” button
20. Make necessary updates/deletions at the Lab Transaction Update or Delete Form
21. Log off of the DDS-W



MODULE 7-1 PROCESSING AND MAINTAINING AUTOMATED DENTAL TREATMENT DATA

PERFORMANCE CHECKLIST

INSTRUCTIONS:

The trainee must be able to satisfactorily perform all tasks without assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Log into the DDS-W		
2. Enter data taken from each AF Form 644		
3. Enter data taken from each DD Form 2322		
4. Review DTL for specified start and end dates		
5. Check each AF 644 and DD 2322 against the DTL		
6. View questionable entries from forms and make updates/deletions as required		

FEEDBACK:

Provide trainee with appropriate feedback. (Refer to Introduction)

**MODULE 7-2 PRODUCING AND MAINTAINING DENTAL REPORTS****STS TASK REFERENCE:**

- 4.9.1. Process and maintain dental automated treatment data

TRAINING REFERENCES:

Dental Data System – WEB (DDS-Web), User's Guide
AFI 47-101, Managing Air Force Dental Services
Dental Management Guide

EVALUATION INSTRUCTIONS:

The trainee must be able to produce and maintain dental reports. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCE:

Dental Data System-Web (DDS-W)

STEPS IN TASK PERFORMANCE:

1. Produce a Dental Service Report (DSR) for the current month; ask the Chief of Dental Services to review it prior to verifying in the DDS-W
 - a. Edit Monthly Base Staffing Report
 - b. Update remarks section in the Monthly Base Staffing Report
 - c. Update Quarterly Facilities Report data, as needed
 - d. Input supply costs per DWV/DLWV, and number of work days for the month
2. Produce a Detailed Provider Report
3. Produce Detailed Provider Report for the past quarter
4. Verify DSR as completed and e-mail to next level (MAJCOM/SGWD)
5. Reprint report selected by trainer
6. File reports

**MODULE 7-2 PRODUCING AND MAINTAINING DENTAL REPORTS****PERFORMANCE CHECKLIST****INSTRUCTIONS:**

The trainee must be able satisfactorily perform all tasks without assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Produce Dental Service Report		
a. Edit Monthly Base Staffing Report		
b. Update remarks section in the Monthly Base Staffing Report		
c. Update Quarterly Facilities Report data, as needed		
d. Input supply costs per DWV/DLWV, and number of work days for the month		
2. Produce a Detailed Provider Report		
3. Produce a Detailed Provider Report for the past quarter		
4. Verify DSR as complete and forward to next level		
5. Reprint report selected by trainer		
6. File reports		

FEEDBACK:

Provide trainee with appropriate feedback. (Refer to Introduction)



MODULE 7-3 INTERPRETING AUTOMATED TREATMENT DATA

STS TASK REFERENCE:

- 4.9.2. Interpret automated treatment data

TRAINING REFERENCES:

Dental Data System – WEB (DDS-Web), User’s Guide
AFI 47-101, Managing Air Force Dental Services

EVALUATION INSTRUCTIONS:

After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist

PERFORMANCE RESOURCES:

Dental Service Report
Dental Monthly Base Staffing Report
Quarterly Facilities Report

STEPS IN TASK PERFORMANCE:

1. Identify the current DSR
 - a. Locate and state the total number of patients treated
 - b. Calculate the percentage of active duty patients treated
 - c. Locate and state the percentage of broken appointments
 - d. Locate and state the total number of DWVs
 - e. Locate and state the total number of DWLVs
 - f. Locate and state the supply cost per DWV and DWLV
 - g. Locate and state the number of active duty flying personnel in each dental readiness class
 - h. Locate and state the number of active duty mobility personnel in each dental readiness class
2. Identify the Monthly Base Staffing Report
 - a. Locate and state key personnel assigned
 - b. Locate and state numbers of dental officers, 4Y0X1s, 4Y0X2s, and other assigned personnel
 - c. Locate and state the total number of active Red Cross volunteers
3. Identify the Quarterly Facilities Report
 - a. Locate and state address of the dental treatment facility, and type of Medical Treatment Facility
 - b. Locate and state year the building was constructed
 - c. Locate and state number of rooms in use

**MODULE 7-3 INTERPRETING AUTOMATED TREATMENT DATA****PERFORMANCE CHECKLIST****INSTRUCTIONS:**

Ensure proper safety precautions are followed. The trainee must satisfactorily perform all parts of the task without assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Use the current DSR		
a. Identify the total number of patients treated		
b. Calculate the percentage of active duty patients treated		
c. Identify the percentage of broken appointments		
d. Identify total of DWVs, DLWVs, and supply cost per DWV, DLWV		
e. Identify active duty flying and mobility personnel in each dental class		
2. Use the Monthly Base Staffing Report		
a. Identify key personnel listed		
b. Identify by status the total number of personnel assigned		
c. Identify the total number of active duty population		
3. Use the Quarterly Facilities Report		
a. Locate and state address of dental treatment facility and type of Medical Treatment Facility		
b. Locate and state the year the building was constructed		
c. Locate and state number of rooms in use		

FEEDBACK:

Provide trainee with appropriate feedback. (Refer to Introduction)



MODULE 7-4 PREPARING MANAGEMENT REPORTS

STS TASK REFERENCE:

4.10 Prepare/review reports and correspondence

TRAINING REFERENCE:

Software application manual

EVALUATION INSTRUCTIONS:

Have the trainee draft a management report using a spreadsheet software application. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCES:

Personal Computer
Spreadsheet Software Program
Floppy Diskette

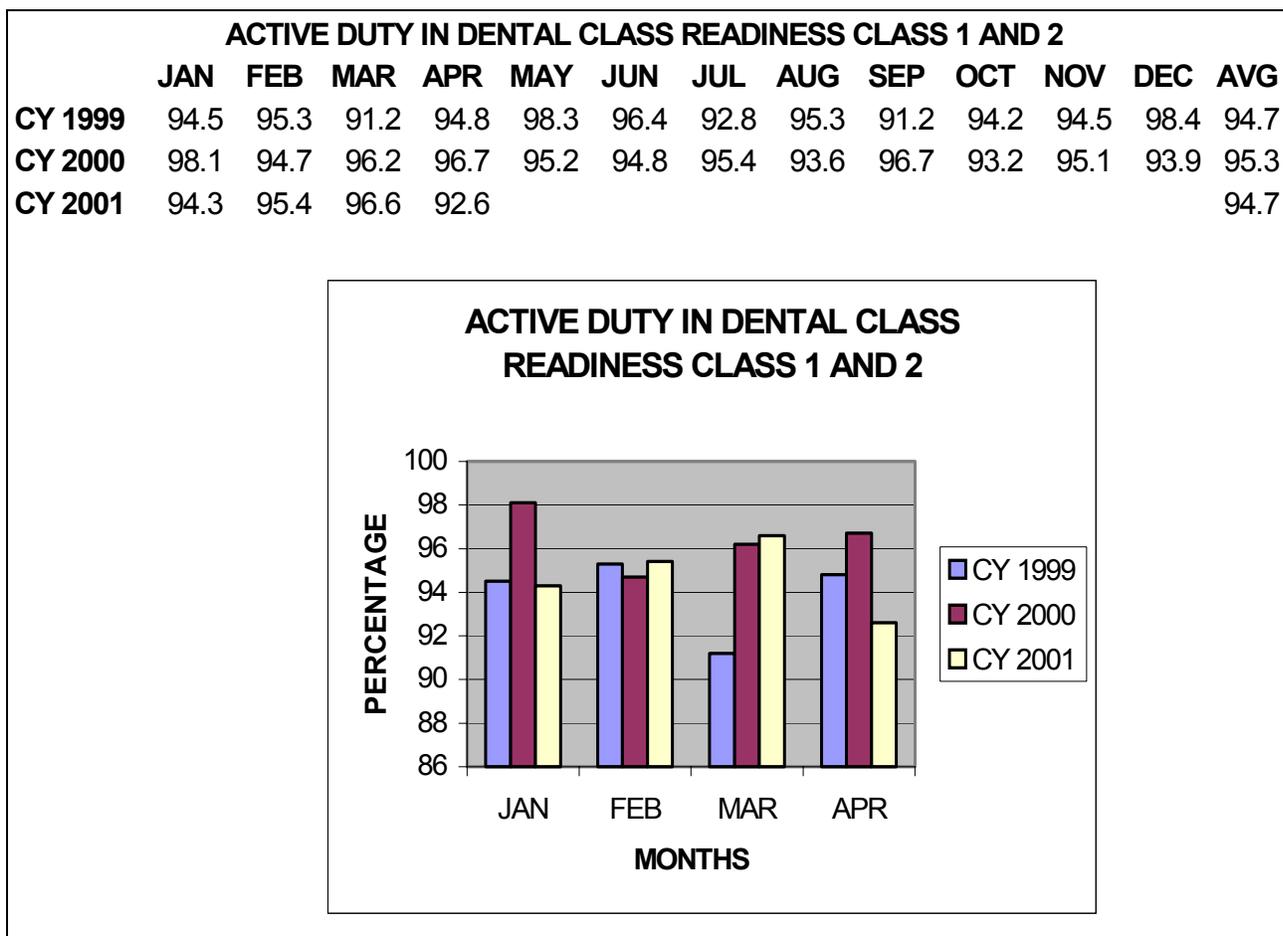
STEPS IN TASK PERFORMANCE:

1. Open spreadsheet program
2. Change paper orientation to landscape
3. Change left and right margin to 0.5 inches
4. Create a worksheet named ACTIVE DUTY IN DENTAL CLASS READINESS CLASS 1 AND 2
5. Bold title
6. Enter the following data. (See example spreadsheet on page 10)

	CY 1999	CY 2000	CY 2001
JAN	94.5	98.1	94.3
FEB	95.3	94.7	95.4
MAR	91.2	96.2	96.6
APR	95.2	96.7	92.6
MAY	98.3	95.2	
JUN	96.4	94.8	
JUL	92.8	95.4	
AUG	95.3	93.6	
SEP	91.2	96.7	
OCT	94.2	93.2	
NOV	94.5	95.1	
DEC	98.4	93.9	



7. Use columns for the months and rows for the years.
8. Center title across all the columns
9. Bold the months and years
10. Center the cells that contain the months
11. Enter a formula or use a function to provide an average for CY1999
12. Copy the formula/function of the CY 1999 Average cell to the CY 2000 and CY2001
Average cells
13. Change CY 1999 APR data to 94.8
14. Confirm that the CY 1999 Average amount changed
15. Create a chart using CY 1999-CY2001 JAN to APR data
16. Save your worksheet/chart as STATS to Drive A:
17. Quit the spreadsheet program
18. Check spreadsheet against the following figure:





MODULE 7-4 PREPARING MANAGEMENT REPORTS

PERFORMANCE CHECKLIST

INSTRUCTIONS:

The trainee must satisfactorily perform all parts of the task without error or assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Change paper orientation and margins		
2. Use columns for months and rows for the years		
3. Enter the correct data		
4. Enter a formula or function to provide the averages		
5. Change CY 1999 APR data		
6. Create a chart using the correct information		

FEEDBACK:

Using this checklist as a source of information, discuss the trainee's performance indicating strengths and weaknesses, suggested improvements, etc. If the trainee performed all steps of the task satisfactorily, both the trainer and trainee should certify performance by appropriately documenting the OJT record.



MODULE 7-5 PREPARING OPERATING INSTRUCTIONS

STS TASK REFERENCE:

- 4.14.3. Draft management reports using computer software applications

TRAINING REFERENCES:

- AFH 33-337, *The Tongue and Quill*
AFMAN 33-326, *Preparing Official Communications*
AFI 33-360V1, *Publications Management Program*
AFI 47-101, *Managing Air Force Dental Services*

EVALUATION INSTRUCTIONS:

Demonstrate how to prepare a dental operating instruction. Have the trainee prepare a dental operating instruction using the scenario provided. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCES:

Computer Performance scenario
Microsoft Word

STEPS IN TASK PERFORMANCE:

1. Conduct research; verify all resources are current
2. Type using Microsoft Word software, 12-point, Times New Roman font
3. Double space, full-measure format, NOT dual-column format
4. Use 1-inch left, right, top, and bottom margins
5. Write in a direct, active voice with simple, grammatically correct, concise sentences
6. Keep paragraphs 7-9 sentences long, divide into subparagraphs or main paragraphs if needed
7. Refer to heading of AFI 47-101 for correct format of title page heading
8. Assign OI number based on series number from AFI 33-360, Volume 1, control number after hyphen begins with Arabic 1 and continues sequentially with each OI
9. Assign effective date on heading as of the issuance date the approval authority assigns
10. Write a 2-4 sentence purpose statement outlining the reason for the OI and who must comply
 - a. Include antecedent policy directive and title, the parent instruction e.g., AFI 47-101, Dental Services
 - b. Material relating to an OSHA standard must include "This instruction is consistent with Air Force Occupational Safety and Health (AFOSH) standard or Department of Labor Occupational Safety and Health Act (OSHA) standard (or standards) (number)."
11. Develop titles for main paragraphs, no more than 10 words
12. List "References" in a single paragraph – if more than 10, then create an attachment
13. Create "Terms Explained" paragraph to spell out acronyms and abbreviations – refer to forms/publications by number and long title the first time used



14. Number main paragraphs consecutively, Arabic numerals; e.g., 1,2, etc. Subparagraphs use Arabic numerals in sequence, separated by periods, progressing from the main paragraph number. Example:
 - 1.1.1. for the first subparagraph
 - 1.1.1.1. for the first paragraph under the first subparagraph
 - 1.1.1.1.1. for the first paragraph under the first sub-subparagraph, etc.
15. Place Title-Page Footnotes – follow format of AFI 47-101 title-page
 - a. Supersession Line. Give the publication number and date of superseded publication.
 - b. Office of Primary Responsibility (OPR). Writer’s office, duty section, rank and name
16. Include signature block of approval authority on last page of publication, before attachments
 - a. Position first line 5 lines below last line of OI
 - b. Position 4.5” from the left edge of the page or three spaces to the right of page center
 - c. Include Name, rank, grade, and service in uppercase on first line
 - d. Use uppercase and lower case on second line for duty title
17. Edit OI for accuracy, currency, integrity, and expected compliance (heading, subject and main titles, title-page footnote, and signature element)
18. Edit for grammar, spelling, punctuation, capitalization, use of references, abbreviations, acronyms, and terms.

Scenario:

Choose a topic from the following list or select one of your own with approval from your trainer. Develop an operating instruction (OI) on the chosen topic. Follow the format of AFI 47-101.

Continuing Education
Dental Patient Management
Facility Management
Periodic Dental Examinations
Resource Management
Occupational Health and Safety
Dental Radiology
Management of Medical Emergencies
Preventive Dentistry Program
Dental Laboratory Safety
Precious Metals and Alloys
Management of Flying / Rated / PRP personnel

**MODULE 7-5 PREPARING OPERATING INSTRUCTIONS****PERFORMANCE CHECKLIST****INSTRUCTIONS:**

The trainee must be able to prepare a dental operating instruction and satisfactorily perform all parts of the task with no more than four trainer assists. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Use correct software, page layout, font, and margins		
2. Present material in a logical, orderly sequence		
3. Write text in an active voice, plain, uncluttered style (avoid jargon)		
4. Conduct research		
5. Correctly format the operating instruction heading		
6. Coordinate OI number with correct series number in AFI 33-360, Volume 1		
7. Write a purpose statement with required elements		
8. Develop titles to describe text of document, paragraphs, etc.		
9. Refer to forms/publications by number and long title the first time used		
10. Identify "References" as a paragraph title or by a glossary		
11. Spell out abbreviations and acronyms under "Terms Explained" title		
12. Correctly number paragraphs and subparagraphs		
13. Complete a footnote with required elements		
14. Correctly format signature element		
15. Edit document		

FEEDBACK:

Using this checklist as a source of information, discuss the trainee's performance indicating strengths and weaknesses, suggested improvements, etc. If the trainee performed all steps of the task satisfactorily, both the trainer and trainee should certify performance by appropriately documenting the OJT record.



MODULE 7-6 PREPARING OFFICIAL CORRESPONDENCE

STS TASK REFERENCE:

- 4.10. Prepare/review reports and correspondence

TRAINING REFERENCES:

- AFH 33-337, *The Tongue and Quill*
AFMAN 33-326, *Preparing Official Communications*

EVALUATION INSTRUCTIONS:

Demonstrate how to prepare an official memorandum. Have the trainee prepare an official memorandum for the scenario provided. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCES:

- | | |
|---------------------|-----------------------------|
| Letterhead | Word processing application |
| Computer/Typewriter | Performance scenario |

STEPS IN TASK PERFORMANCE:

1. Develop an Official Memorandum and Memo for Record for the scenario on the next page
2. Obtain the proper letterhead (printed or computer-generated)
3. Type or print on one side of the paper using blue or blue-black ink using 10 to 12 point fonts
4. Prepare the memorandum using plain language. Use logical organization; common, every day words, (except for necessary technical terms); “you” and other pronouns; the active voice; and short sentences
5. Use 1-inch margins on the left, right, and bottom for memorandums of 20 lines and longer. Use 1 to 1 ½-inch margins for 10-19 lines and 1 ½ to 2-inch margins for 1-9 lines
6. Place the date 10 lines from the top and flush with the right margin using the day, month, year format, for example, 25 February 2002
7. Type “MEMORANDUM FOR” in uppercase flush with the left margin, 2.5 inches/14 lines from the top of the page
8. Type “FROM: ” in uppercase, flush with the left margin, two line spaces below the last line of the MEMORANDUM FOR element
9. Type “SUBJECT:” in uppercase, flush with the left margin, two line spaces below the FROM element
10. Begin the first line of the text two lines below the last line of the SUBJECT element
11. Number and letter each paragraph and subparagraph (a single paragraph is not numbered)
12. Indent subparagraphs 0.5-inch or five spaces and number and letter in sequence
13. Establish a suspense only when you need a reply by specific date



14. Follow the six basic steps for effective writing
 - a. Analyze purpose and audience
 - b. Conduct the research
 - c. Support your ideas
 - d. Organize the memorandum into; introduction, body, and conclusion
 - e. Draft and edit
 - f. Get specific positive and negative feed back
15. Edit for proper punctuation, abbreviations, capitalization, acronyms and numbers

Scenario:

You are the Dental Laboratory NCOIC. During your review of the HAZCOM Program you noticed that the laboratory is months over due for the required Bioenvironmental Periodic Survey. You are to draft an Official Memorandum requesting an appointment be established to complete this inspection. You should include your concerns about the health and welfare of your staff. Add an explanatory Memorandum for Record (page 157-158 of *The Tongue and Quill*) to the squadron copy. Include the purpose of the Official Memorandum, background information, and a statement about coordination of the memorandum through the Dental Laboratory Officer.

A sample Official Memorandum can be found in AFMAN 33-326, *Preparing Official Communication*.



MODULE 7-6 PREPARING OFFICIAL CORRESPONDENCE

PERFORMANCE CHECKLIST

INSTRUCTIONS:

The trainee must be able to prepare an official memorandum and satisfactorily perform all parts of the task without assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Correctly format the memorandum		
2. Prepare the memorandum using plain language		
3. Analyze the purpose and audience		
4. Conduct research		
5. Support ideas		
6. Develop an introduction, body, and conclusion		
7. Draft and edit		
8. Get feedback		
9. Check punctuation, abbreviations, capitalization, and numbers		

FEEDBACK:

Using this checklist as a source of information, discuss the trainee's performance indicating strengths and weaknesses, suggested improvements, etc. If the trainee performed all steps of the task satisfactorily, both the trainer and trainee should certify performance by appropriately documenting the OJT record.



MODULE 7-7 MANAGING FINANCIAL REQUIREMENTS

STS TASK REFERENCE:

11.10 Aid in preparation of budget and financial requirements

TRAINING REFERENCES:

AFI 41-120, *Medical Resource Management Operations*
AFI 41-209, *Medical Logistics Materiel and Services Support*
AFI 47-101, *Managing Air Force Dental Services*

EVALUATION INSTRUCTIONS:

Demonstrate how to prepare the budget/financial plan for the following fiscal year. Have the trainee assist in preparing the budget/financial plan for the following fiscal year. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCES:

Base Dental Service Reports
Cost Center Managers Guide
Current and Past Budgets
Historical Maintenance Report (HMR)
Three-Year Equipment Requirement List
Resource Center Manager Cost Center Reports

**STEPS IN TASK PERFORMANCE:**

1. For budget preparation in general, the following applies:
 - a. Get started early and take notes on factors that will affect your budget
 - b. Develop budget on known rate increases, projected workload, and historical data
 - c. Incorporate into the budget any mission changes, financial analyses, and anticipated changes for the coming year which affect expenses
 - d. Review current budget obligations and analyze cost increases
 - e. Make all estimates in increments of thousands of dollars, rounded to the nearest hundred dollars
 - f. Expenditures of section funds are reported by Element of Expense/Investment Code (EEIC)
2. Estimate expenses for code 40 - Temporary Duty (TDY)
3. Account for operational TDYs (consultant visits, ADL workshops, attendance at symposia, etc.), continuing education (meetings, locally funded courses, etc.), and administrative (MAJCOM conferences, promotion and resident selection boards, specialty board examinations, etc.) needs
4. Estimate expenses for code 604 - Medical/Dental supplies
5. Review historical data such as cost per Dental Weighted Value (DWV) and cost per Dental Lab Weighted Value (DLWV) for estimate of medical/dental supplies
6. Justify requests for increased or decreased funding based on changes in manpower, mission, or known costs; be specific and prepare requests in detail
7. Estimate expenses for code 609 - Nonmedical supplies
8. Account for printing costs (resident training materials, patient education handouts, etc.) and purchased maintenance for equipment
9. Estimate expenses for code 624 - Medical expense equipment
10. Review three-year equipment replacement plan to ensure all equipment projected to be replaced is included in the budget, also review HMR
11. Estimate expenses for code 628 - Nonmedical expense equipment
12. Prepare and report estimates of expenses in budget
13. Carefully monitor expenditure rates during the fiscal year
14. Advise the Resource Management Office of any changes increasing fund consumption at any time during the year
15. Prepare justification to support EEIC changes



MODULE 7-7 MANAGING FINANCIAL REQUIREMENTS

PERFORMANCE CHECKLIST

INSTRUCTIONS:

The trainee must be able to assist in preparing the budget/financial plan for the following fiscal year. Evaluate the trainee’s performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Estimate expenses for code 40 - Temporary Duty (TDY), considering all operational, continuing education, and administrative needs		
2. Estimate expenses for code 604 - Medical/Dental supplies based on known rate increases, projected workload, and historical data		
3. Estimate expenses for code 609 - Nonmedical supplies, accounting for all nonmedical needs		
4. Review three-year equipment replacement plan and HMR to ensure all equipment projected to be replaced is included in the budget		
5. Estimate expenses for code 624 - Medical expense equipment		
6. Estimate expenses for code 628 - Nonmedical expense equipment		
7. Assist in preparing financial plan		

FEEDBACK:

Provide trainee with appropriate feedback. (Refer to Introduction)



MODULE 7-8 EVALUATING STAFFING REQUIREMENTS

STS TASK REFERENCE:

- 13.9. Evaluate manning, staffing and utilization requirements

TRAINING REFERENCES:

Air Force Manning Standard 5421a - AEGD
Air Force Manning Standard 5421 - Dental Clinic
Air Force Manning Standard 5422 - Base Dental Laboratory
Air Force Manning Standard 5423 - Area Dental Laboratory
Dental Management Guide (March 1996)

EVALUATION INSTRUCTIONS:

Demonstrate how to evaluate staffing requirements. Have the trainee evaluate staffing requirements. After ensuring the trainee has received sufficient practice, evaluate his/her abilities using the performance checklist.

PERFORMANCE RESOURCES:

Unit Manning Document (UMD)
Unit Personnel Management Roster (UPMR)

STEPS IN TASK PERFORMANCE:

1. Review the UMD to determine manpower authorizations
2. Compare authorizations listed on the UMD with assigned personnel listed on the UPMR
3. Ensure assigned personnel are matched against an authorized position number within their control AFSC
4. Identify overages or shortages in assigned manpower versus authorizations



MODULE 7-8 EVALUATING STAFFING REQUIREMENTS

PERFORMANCE CHECKLIST

INSTRUCTIONS:

The trainee must be able to evaluate staffing requirements and satisfactorily perform all parts of the task without assistance. Evaluate the trainee's performance using this checklist.

DID THE TRAINEE...?	YES	NO
1. Correctly identify the UMD and UPMR		
2. Match members on UPMR against authorized position number on UMD		
3. Verify each member was matched to the appropriate CAFSC		
4. Identify overages or shortages in assigned manpower versus authorizations		

FEEDBACK:

Provide trainee with appropriate feedback. (Refer to Introduction)



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Dental Assistant Qualification Training Progress Record

Rank/Name _____

Qualification Upgrade Training to: 5-Skill Level 7-Skill Level

<i>Volume 7. Clinic Management</i>					
<i>Core Task</i>	<i>Module Number</i>	<i>Page Number</i>	<i>Module Title</i>	<i>Date Completed</i>	<i>Trainer's Initials</i>
	1.	1	Processing and Maintaining Automated Dental Treatment Data		
	2.	4	Producing and Maintaining Dental Reports		
⑦	3.	6	Interpreting Automated Treatment Data		
⑦	4.	8	Preparing Management Reports		
⑦	5.	11	Preparing Operating Instructions		
⑦	6.	14	Preparing Official Correspondence		
⑦	7.	17	Managing Financial Requirements		
⑦	8.	20	Evaluating Staffing Requirements		

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MEMORANDUM FOR 381 TRS/XWAA (CDC Manager)
917 Missile Rd
Sheppard AFB TX 76311-2246

FROM:

SUBJECT: Qualification Training Package Improvement

1. Identify volume and module.

Volume # _____

Module # and
title _____

2. Identify improvement/correction section(s)

_____ STS Task Reference	_____ Performance Checklist
_____ Training Reference	_____ Feedback
_____ Evaluation Instructions	_____ Format
_____ Performance Resources	_____ Other
_____ Steps in Task Performance	

3. Recommended changes--use a continuation sheet if necessary.

4. You may choose to call in your recommendations to DSN 736-7722 or FAX DSN/Commercial 736-2781 or (940) 676-2781.

5. Thank you for your time and interest.

YOUR NAME, RANK, USAF
Title/Position