



## Higher National Unit specification

### General information for centres

**Unit title:** Oral Health Care: Implement Appointments and Payment Systems

**Unit code:** F20N 33

**Unit purpose:** This Unit is designed to provide candidates with the skills and knowledge to effectively implement appointments and payments systems within a dental environment. It covers the different methods of making appointments and receiving and making payments across a variety of dental settings such as hospital out-patient, clinic, day settings, private dental practices.

On completion of the Unit the candidate should be able to:

- 1 Implement an appointments system to meet patient and organisations needs.
- 2 Implement and reconcile a payments system.
- 3 Complete banking transactions according to organisational procedures.

**Credit points and level:** 1 HN credit at SCQF level 6: (8 SCQF credit points at SCQF level 6\*)

*\*SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

**Recommended prior knowledge and skills:** Access is at the discretion of the centre. It would be beneficial if candidates had prior knowledge and/or experience of working with figures which could be evidenced by achievement of relevant Units at SCQF level 4 or above.

**Core Skills:** There are opportunities to develop aspects of the Core Skills of *Communication*, *Numeracy* and *IT* at SCQF level 4 or above in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

**Context for delivery:** If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes. This is a mandatory Unit in the framework for the PDA Oral Health Care: Dental Administrators at SCQF level 6.

**Assessment:** Assessment could take the form of a portfolio of evidence including work products and observation by an assessor or expert witness. The portfolio should include evidence of transaction and banking documentation, and records of appointments and payments. There should be measures in place to ensure both patient confidentiality and authenticity of the work produced by the candidate.

## **Higher National Unit specification: statement of standards**

**Unit title:** Oral Health Care: Implement Appointments and Payment Systems

**Unit code:** F20N 33

The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Candidates should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

### **Outcome 1**

Implement an appointments system to meet patient and organisational needs

#### **Knowledge and/or Skills**

- ◆ Principles of good practice and communication skills
- ◆ Appointments systems
- ◆ Patients' requirements
- ◆ Types and sources of appointment
- ◆ Organisational procedures
- ◆ Recall and follow-up procedures
- ◆ Record keeping
- ◆ Confidentiality and legislation

#### **Evidence Requirements**

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can:

- ◆ communicate with patients in an appropriate and effective manner using a minimum of three forms of communication
- ◆ describe the types and sources of appointments
- ◆ use appropriate systems to plan, monitor and record appointments
- ◆ update and maintain accurate patient records in accordance with legislative requirements and organisational procedures

#### **Assessment Guidelines**

This Outcome may be assessed holistically with Outcome 2 and Outcome 3 by a portfolio of evidence which could include examples of work products. This should include observation by an assessor or expert witness of the candidate's communication, interpersonal and administrative skills.

## **Higher National Unit specification: statement of standards (cont)**

**Unit title:** Oral Health Care: Implement Appointments and Payment Systems

### **Outcome 2**

Implement and reconcile a payments system

#### **Knowledge and/or Skills**

- ◆ Required documentation
- ◆ NHS entitlements and exemptions
- ◆ Requirements for estimates
- ◆ Organisation's current fees and charges
- ◆ Different methods of payment and additional fees which may attach to these
- ◆ Organisational procedures for handling, reconciling and disposal of cash/cash equivalents
- ◆ Apportionment of fees
- ◆ Dental Plans, Insurance
- ◆ Action to be taken in event of theft or fraud

#### **Evidence Requirements**

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can:

- ◆ complete appropriate payment documentation accurately
- ◆ advise patients on charges, fees and payment methods
- ◆ calculate and balance monies received accurately against records of payments in accordance with organisational procedures
- ◆ deal appropriately with different methods of payment, ie cash and cash equivalents
- ◆ identify and deal with discrepancies where necessary
- ◆ handle and dispose of monies in accordance with organisational policy and procedure
- ◆ comply with any legal requirements in relation to the handling of monies

#### **Assessment Guidelines**

This Outcome could be assessed holistically with Outcome 1 and Outcome 3 by a portfolio of evidence containing work products which should include observation of the candidate providing fee and payment advice to patients. Observation should be carried out by an assessor or expert witness using an appropriate checklist.

## **Higher National Unit specification: statement of standards (cont)**

**Unit title:** Oral Health Care: Implement Appointments and Payment Systems

### **Outcome 3**

Complete banking transactions according to organisational procedures

#### **Knowledge and/or Skills**

- ◆ Procedures and transaction documentation for paying-in and withdrawing monies
- ◆ Relationships between different transactions
- ◆ Cash flow principles and consequences of failing to check payments and withdrawals
- ◆ Security and storage of cash/cash equivalents
- ◆ Record keeping
- ◆ Procedures for dealing with discrepancies

#### **Evidence Requirements**

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can:

- ◆ complete transaction documentation accurately for paying-in and withdrawal
- ◆ comply with requirements to ensure that transaction are made at the appropriate times to ensure good cash flow and avoid penalties
- ◆ calculate cash requirements and bag-up cash payments
- ◆ understand the need for accurate record-keeping of all transactions

#### **Assessment Guidelines**

This Outcome may be assessed holistically with Outcome 1 and Outcome 2 by a portfolio of evidence containing work products, eg completed calculations, transaction documentation and accurate records.

## Administrative Information

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|--------------------------------------|--|
| <b>Unit code:</b>                    | F20N 33  |
| <b>Unit title:</b>                   | Oral Health Care: Implement Appointments and Payment Systems |
| <b>Superclass category:</b>          | PF   |
| <b>Original date of publication:</b> | August 2007  |
| <b>Version:</b>                      | 01   |

### History of changes:

| Version | Description of change | Date |
|---------|-----------------------|------|
|         |                       |      |
|         |                       |      |
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## **Higher National Unit specification: support notes**

### **Unit title: Oral Health Care: Implement Appointments and Payment Systems**

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

### **Guidance on the content and context for this Unit**

This Unit considers the systems used within dental environments to make, control and monitor appointments and payments. It will provide candidates with the knowledge and skills to implement such systems in an effective manner.

Outcome 1 focuses on implementation of appointments systems and aims to develop knowledge and skills required to manage effectively an accurate appointments system.

In this Outcome the following should be covered:

- ◆ Principles of good practice: the need for good communication and interpersonal skills particularly when dealing with patients who may be anxious, in pain or have additional needs to be met
- ◆ Different types of appointment should be explored, ie regular check-ups, on-going treatment, emergencies, recalls, referrals from other agencies (school service, GP practices, clinics, Day Care, Residential Care Homes etc)
- ◆ Different systems for managing appointments, eg electronic, computer-based, manual
- ◆ Relevant patient details to be recorded including home address, emergency contact, any previous treatment, referrals, pre-existing medical condition(s), medications etc
- ◆ Reasons for confirming appointments and recall procedures
- ◆ Organisational procedures and requirements in relation to scheduling appointments
- ◆ Monitoring the schedule of appointments on an ongoing basis throughout the working day
- ◆ Meeting patient expectations and requirements, eg timing of appointments to meet child care, work or travel demands
- ◆ Matching timing and duration of appointments to the type of treatment required and available staffing: the effect of different treatments may have on the length of appointment and any follow-up should be discussed and understood
- ◆ Potential after-effects of particular types of treatment
- ◆ Importance of accurate record keeping and cross-referencing of appointments and treatments in patients' files
- ◆ Importance of confidentiality, patient's right of access to records, Data Protection and Freedom of Information Acts, Codes of Practice and organisational policies and procedures

## Higher National Unit specification: support notes (cont)

### Unit title: Oral Health Care: Implement Appointments and Payment Systems

Outcome 2 focuses on the receipt, handling and disposal of fees, charges, cash and cash equivalents (eg credit card or other credit-based payments). It should also cover in some detail the dental-specific areas of dealing with payments received via the NHS, Dental Plans and other insurance policies, occupational benefit plans (eg BUPA), apportionment of fees and the organisational procedures surrounding these. In particular, content should include the following:

- ◆ Information to patients on NHS entitlements and exemptions — what these are, who qualifies and to what extent, providing advice on how to apply
- ◆ Requirements for estimates and the circumstances from which this may arise
- ◆ Current charges and fees for dental treatment
- ◆ Payment options: cash, cheque, credit, insurance (Dental Plans, BUPA etc) and any additional fees these varying options may attract
- ◆ Organisational procedures for handling and processing payments: procedures from different workplaces could be explored and compared
- ◆ Documentation for receiving, recording and disposing of payments and fees
- ◆ Security and storage of cash and cash equivalents
- ◆ Procedures for checking and processing credit card payments including authorisations where required — the need to check the currency, validity and credit limits should be covered
- ◆ Provision of full and accurate receipts
- ◆ Procedures used by the organisation to recover fees owed where there is non-payment
- ◆ Procedures for dealing with discrepancies
- ◆ Action to be taken where fraud or theft is suspected
- ◆ Limits of worker's responsibility
- ◆ Legislative requirements

Outcome 3 covers the procedures for banking cash and cash equivalents. Content for this Outcome should include the following:

- ◆ Need for accurate calculation of payments
- ◆ Need for accurate completion of relevant documentation
- ◆ Potential problems within a payment — eg incomplete information on cheques, credit card details not matching
- ◆ Problems reconciling transactions and methods of dealing with discrepancies
- ◆ Need to ensure timeous completion of transactions to ensure adequate cash flow
- ◆ Need to ensure withdrawals are carried out in accordance with organisation procedure and are within the worker's limit of responsibility
- ◆ Need for accurate record keeping
- ◆ Confidentiality and compliance with relevant legislation

## Higher National Unit specification: support notes (cont)

**Unit title:** Oral Health Care: Implement Appointments and Payment Systems

### Guidance on the delivery and assessment of this Unit

Evidence for this Unit should largely come from the candidate's practice in the dental environment. Direct observation, work products such as bookkeeping entries, records. There should be arrangements in place to ensure authenticity of evidence presented by the candidate.

#### *Opportunities for developing Core Skills*

There are opportunities to develop aspects of the Core Skills of *Communication, Numeracy* and *IT* at SCQF level 4 or above in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

**Communication:** Oral Communication could be evidenced through observation of the candidate's interpersonal communication skills in dealing with patient's enquiries and by responses to oral questions. Written Communication could be evidenced by completed documentation and record keeping.

**Problem Solving:** Critical Thinking, Planning and Organising, Reviewing and Evaluating could be evidenced through the portfolio of workplace evidence and observation of the candidate advising a patient on fees and payments methods.

**IT:** could be evidenced through data input, storage and processing of information essential in appointments and payments management systems.

**Numeracy:** could be evidenced by reference to the portfolio of evidence particularly in relation to cash-handling and banking transaction documentation.

### Open learning

This Unit requires aspects of skills and knowledge to be demonstrated in a workplace environment. While aspects of this Unit, particularly theory and knowledge, may be suitable for open or blended learning approaches, it is anticipated that the majority of evidence will be drawn from actual working practices and access to the workplace or placement will be necessary.

### Candidates with disabilities and/or additional support needs

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering alternative Outcomes for Units. Further advice can be found in the SQA document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* ([www.sqa.org.uk](http://www.sqa.org.uk)).



## General information for candidates

### **Unit title:** Oral Health Care: Implement Appointments and Payment Systems

This Unit is designed to provide you with the skills and knowledge to effectively implement appointments and payments systems within a dental environment. It covers the different types of appointment, methods of making appointments and receiving and making payments across a variety of dental settings such as hospital out-patient, clinic, day settings, private dental practices. It also highlights the importance of good communication and interpersonal skills and will help to develop your Core Skills in *Communication, Working with Others, Numeracy IT* and *Problem Solving*.

On completion, you will be able to:

- ◆ Implement an appointments system to meet patient and organisations needs
- ◆ Implement and reconcile a payments system
- ◆ complete banking transactions according to organisational procedures

The Unit is assessed by gathering a portfolio of evidence containing appropriate work products.