

PCC 146

Office Manual Project Winter 2016.

This document provides the details for the PCC 146 team project to create an Office Operations, Staff, and Policy Manual for an imaginary group practice that includes your teammates from the PCC 149 clinical course.

The contents of this manual will mirror the type of information a dentist in private practice would need to administer his/her office. Practice management consultants strongly encourage practitioners to create an office manual as it helps to clarify the goals, objectives and systems of the practice and to communicate in explicit language what is expected of each staff member. Students that have completed this assignment in past years have commented that the manual became a valuable resource when it came time to start their own practice.

This project is due on **March 15 by 5pm** in the Curriculum Support office on the third floor. Please deliver one copy of the manual, bound in a three ring binder there.

A sample office manual from the 'Parnassus Smile Shop' is posted in this tab on CLE in a Word document entitled 'SAMPLE CONTENTS OF A PRACTICE POLICY MANUAL.'

You'll see that the sample manual has completed most of the sections described below, and you can use it as a template for your project. There will also be additional resource material posted, and possibly distributed to you for your personal use. As you'll note in the section below on Organization of the Manual, your group is expected to present a customized version of these resources. You may use the sources verbatim or create some pages de novo.

Your team will have the responsibility of determining how the assignment will be divided up and completed. Each team member will be graded on the effort by the entire team. IT IS CRITICAL THAT EACH TEAM MEMBER READ AND FILL OUT THE TABLE ON PAGE 9 OF THE SAMPLE CONTENTS DOCUMENT. We then can be reassured that the entire team participated and can be graded.

Grading

Possible grades are honors (an extraordinary effort), pass (a very good effort) or fail (an inferior effort.) Along with the grading will be short written comments about the manual's contents.

Miscellaneous Information

The office manual sample pages are copyrighted and cannot be used or distributed for any other purpose other than for this educational project.

The graded manuals will be returned to one of the team members for future use by the entire team.

Have fun and enjoy this assignment. It is our hope that this project will give you greater insights into what you will need to create for your own office once you have entered practice. Good luck!

Organization of the Manual:

1. Cover sheet with name of a chosen practice name (have some fun with this!), date, and team members' names.

2. Table of Contents, listing all sections and subsections of manual.

3. Philosophy Section:

A. A personal mission statement for each dentist: what he/she personally wants in the practice of dentistry.

B. A practice mission statement: what the team hopes to accomplish together in the practice

C. A set of core values also known as the practice philosophy statements.

D. A set of practice goals and objectives: tangible, realistic, measurable goals.

4. Tools for Measuring the Success of the Practice

This section comprises the methods and data needed to determine the accomplishments and prosperity of the practice.

5. Personnel Management section:

This section contains general office policies, standard operating procedures and employment guidelines.

As described above, each of these topics will have three examples of policies and procedures.

6. Forms:

This section contains any forms that the practice will use such as examination forms, treatment plan forms, referral forms, lab prescriptions, administrative forms.

7. References:

This section contains any references, resources, bibliographies and similar material that would be used for the further enrichment of the practice

Description of this Project

Your team may create a comprehensive practice manual. However, for this assignment, the following items must be included:

1. Create a COVER SHEET
2. Create a TABLE OF CONTENTS
3. In the PHILOSOPHY SECTION create:
 - a. A one paragraph personal mission statement
 - b. A two paragraph practice mission statement
 - c. 10 items that describe a set of core values or practice philosophy statements
 - d. 10 items that comprise a set of practice goals and objectives.

4. In the TOOLS FOR MEASURING SUCCESS section, create a way to measure each of the 10 goals and objectives from section 3d. Keep in mind the following two questions:
 - a. How do successful practices measure themselves to determine their progress towards attaining their goals?
 - b. How will your practice measure itself to determine the progress towards attaining your goals?
5. In the PERSONNEL MANAGEMENT, divide it into at least three sections:
 - a. General Office Policies and Employee Benefits. These describe the overall functioning of the office and could include job descriptions, attendance policies, and vacation pay, for example. Please provide THREE such examples. You'll see that the Parnassus Smile Group has one describing the probationary employment period for a new employee.
 - b. Front office procedures. These describe the detailed procedures that you expect the non-clinical (front office) team to use. Please provide THREE such examples. You'll see that the Parnassus Smile Group explains how a patient should be greeted and checked in when arriving at the office.
 - c. Clinical Procedures. These should be a detailed description of the Standard Operating Procedures for each patient treatment. Please provide THREE such examples. You'll see that the Parnassus Smile Group lists the steps involved in an interproximal amalgam restoration.
6. In the FORMS section, you would normally have such things as a completed laboratory form, patient instruction form or possibly a completed prescription. For this project, please include at least 2 forms from UCSF as examples, such as the prosthodontic lab form and the oral surgery referral form.
7. In the REFERENCE section, list examples of professional resources. You'd list your accountant, payroll supervisor, attorney, etc.
8. Each member of the team must print and sign his/her name to authenticate his/her collaboration in this project.