

DENTAL ASSISTANT SPECIALTY

Budget and Financial Planning



Volume 7

**381st Training Squadron
2931 Harney Road
Fort Sam Houston, TX 78234**

QTP 4Y0X1-7

DENTAL ASSISTANT SPECIALTY

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INTRODUCTION

1. Volume 6, *Logistics Management*, Qualification Training Package (QTP) contains training reference and steps to aid and prepare budget and financial requirements to support dental treatment facility (DTF) operations and overall Department of Defense (DoD) Medical Mission. This QTP enhances the 7-skill level on-the-job training (OJT) for a dental assistant craftsman. Trainers and trainees may use the training references listed in each module to compliment training. Trainees, trainers, supervisors, and task certifiers must use all QTPs to conduct upgrade training. Before initiating any training, review your responsibilities as a supervisor/trainer for conducting OJT per AFI 36-2201, Chapter 6, *Air Force Training Program On-The-Job Training Administration*.

2. QTPs are instructional packages designed to help you conduct and evaluate your field training. Once you begin upgrade training, you are required to use the QTPs. QTPs provide continuity to the trainee's upgrade training and are divided into the following volumes: 1) *Basic Skills and Infection Control*; 2) *Clinical Skills-Radiology*; 3) *Clinical Skills-Chairside Assisting*; 4) *Clinical Skills-Preventive Dentistry*; 5) *Patient Administration*, 6) *Logistics Management* and 7) *Budget and Financial Planning*. Developers designed the QTP modules to assist you in preparing for and conducting training. 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. 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" supporting and standardizing those tasks. When you are satisfied the trainee meets standards, as prescribed in the QTP performance checklist, you must document each task completion in the QTP tab. If you are recertifying on a task supported by a QTP, you must use the appropriate module to complete the recertification process.

3. Typically, you will manage each module by 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 may 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 organized and methodical approach will reduce your training time and enhance your efforts.

4. The QTPs are tools for assessing/certifying the Dental Assistant initially and each time they arrive at a new duty station. Trainees, trainers, supervisors, and task certifiers must use the QTP as a tool for standardizing annual refresher training. Our goal has been to publish a useable document for both the trainee and trainer. We value your first hand expertise and solicit your feedback on how we can improve our product. Direct all inquiries to:

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MODULE 1: BUDGET PLANNING AND FINANCIAL REQUIREMENTS

DENTAL ASSISTANT SPECIALTY QTP

TASK NAME: Aid in Preparation of Budget and Financial Requirements

OBJECTIVE: Provided all references and documents, aid in preparation of budget and financial requirements IAW the performance checklist.

CFETP/STS REFERENCES:

11.7 Aid in preparation and budge of financial requirements

EQUIPMENT REQUIRED:

1. Base Dental Service Reports
2. Cost Center Manager's Guide
3. Current and past budget plans
4. Historical Maintenance Report (HMR)
5. Three-year equipment requirement list

TRAINING REFERENCES:

1. AFI 41-209, *Medical Logistics Support*
2. AFMAN 41-120, *Medical Resource Management Operations*
3. AFMAN 47-101, *Managing Dental Services*
4. Air Force Dental Service (AFDS) Dental Management Guide (DMG)
5. CDC 4Y071 Volume 1, *Dental Assistant Craftsman*
6. Local Directives and Guidelines

PERFORMANCE CHECKLIST TASK: Aid in Preparation of Budget and Financial Requirements

EVALUATION INSTRUCTIONS:

1. After the trainee has received instruction and allowed sufficient supervised practice, evaluate the trainee's abilities using this performance checklist.
2. The trainee must perform all parts of the task *without* assistance.
3. The evaluator will evaluate the trainee's performance using this checklist.
4. Once completed, the supervisor must certify performance in the member's AFTR.

NOTE: The evaluator will STOP the procedure immediately and correct the member if performance is detrimental to patient safety.

Step-by-step procedures	GO	NO GO	NOTES
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. Expenditures of section funds are reported by Element of Expense Investment Codes (EEICs)			
2. Estimate expenses for temporary duty (TDY)			
3. Account for operation TDYs (consider continuing education [CE], symposia attendance, etc. that is/are mission-essential training for both officer and enlisted members IAW local/MAJCOM/AFMOA/AFMS requirements)			
4. Estimate expenses for medical and dental supplies			
5. Review historical data such as cost per Dental Weighted Values [DWVs] and cost per Composite Laboratory Value [CLVs] for estimate medical/dental supplies			
6. Justify request for increased or decreased funding based on changes in manpower, mission or known costs; be specific and prepare request in detail			
7. Estimate expense for nonmedical supplies			
8. Account for printing costs (resident training materials, patient education handouts, etc., and maintenance/contracts for equipment)			

9. Estimate expense for medical expense equipment			
10. Review three-year equipment replacement plan to ensure all equipment projected to be replaced is included in the budget, also include HMR			
11. Estimate expenses for 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 (RMO) of any changes increasing fund consumption at any time during the year			
15. Prepare justification to support EEIC changes			
FINAL RESULT			