

## Way to Represent!



### SDS Delegates & Alternate Delegates at the House of Delegates

- Dr. Alexandra Hebert
- Dr. Joseph Kolody
- Dr. Christina Lee Zertuche
- Dr. Andrew Smith
- Dr. Matt Swatman
- Dr. Elizabeth Demichelis

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Your contributions in the form of articles, photos and/or ideas are greatly appreciated. The APEX editorial staff is interested in articles of general membership interest. This can include an accomplishment, interesting hobbies, innovative ideas, volunteer efforts, etc. Please feel free to submit an article or call for an interview. All articles are subject to editorial review.



# Presidential Pondering

Dr. Alexandra Hebert, SDS President

As this year comes to a close, I wanted to take a minute to let you all know what incredibly hard work your 2024 SDS Board has been doing on your behalf.

As many of you may know, last year we submitted a resolution to the CDA House of Delegates (HOD) with the intention of obtaining more information on the sale of TDSC in 2020 and its subsequent financial losses. While this resolution ultimately did not get adopted by the house in 2023, the attention it garnered and the coalition it built, resulted in the formation of the TDSC Historical Workgroup who submitted their final report this August. On this historic panel was our very own Dr. Bruce Valentine who fought valiantly for transparency and accountability. The report details the \$69 million dollar loss, reduced to \$47 million when accounting for the \$22 million tax benefit generated.

At the CDA House of Delegates this November, Stanislaus and Fresno-Madera components submitted a resolution to have this workgroup report filed with the House and it was largely accepted. While we remain frustrated by the initial resistance we received in asking for more information, by filing the documents with the HOD, we are confident that the historical knowledge it contains will serve as a learning process for future investment endeavors in addition to detailing an accurate financial loss. We hope the persistence in advocating for this information demonstrates to CDA leadership our demand for transparency and accountability in all actions moving forward.

In addition to our resolution, there were several that I would like to highlight. While we will not be seeing the return of the Peer Review Council, we voted to establish a CDA Council on Professionalism and Mediation which will include a Dispute Resolution Program. This will include the implementation and training of mediators and will provide support staff for members to reach out to if the need should arise. CDA has also adopted a resolution calling for a task force, composed of diverse membership representatives, to evaluate both CDA and ADA membership as these organizations look to make our membership more affordable and person specific.

One of the most contentious resolutions was a call for another \$100 dues increase. As we know, our dues were already increased by \$100 last year. The additional \$100 this year, with \$50 in 2026, was laid out as incremental dues increases necessary to cover the cost of CDA's annual operations budget largely due to inflationary cost increases and decreases in non-dues revenue, including a decrease in presenter revenue from CDA Presents. I want you to know that your board strongly opposed this increase. Every single board member (4 total) in attendance spoke vehemently against the increases to the entire house. There was a large coalition who also opposed the dues increase, however despite vocal dissent, the resolution narrowly passed.

While we stand against this and future dues increases, I know that personally, I still see tremendous value in the services that CDA offers and my call to action for myself and you are to utilize these resources. Familiarize yourself with what is

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TDSC . . . (800) 253-1223

Denti-Cal Referral

.....(800) 322-6384

(cont. from Page 3)

offered in Practice Support. I use practice support at least twice a month for things as simple as new hire documents and patient letter templates. When it came time to implement a Workplace Violence Prevention Program, it was as simple as printing out the form and walking through a checklist. I also encourage you to have your staff call on your behalf. If my office manager has an issue with an insurance claim or reimbursement, her first call is the Practice Support staff who specialize in these issues. The value to our membership is extensive, we just need to utilize what is available. Do you have an example of a resource you find beneficial? Please let us know and we would love to highlight it for all our members!

In addition to what membership does for us personally, the value of advocacy and policy CDA undertakes cannot be overstated. Many received checks from Delta Dental after a lawsuit was brought on your behalf and many more lawsuits are still ongoing. Research and education on fluoride and other public health projects are funded on both a state and national level. We have all seen the changes medicine has endured in practice models and dentistry is not far behind. We owe it to ourselves, our profession, and our patients to continue advocating for a better way to practice dentistry.

Finally, I would like to take a moment to thank the people who have given us the context and guidance to successfully submit resolutions and build relationships with like-minded components across the state. First, I would like to thank Dr. Elizabeth Demichelis for her unwavering dedication to advocacy and policy. She has worked tirelessly to keep our local component connected through her state and national connections ensuring we have the best information and helping us collaborate with other representatives. She helped craft resolutions, letters, and invested her time and resources many times over. I would also like to thank Dr. Bruce Valentine, CDA and SDS past president, for volunteering his time on the TDSC Historical Workgroup. This endeavor took an incredible amount of time and we were so grateful to have someone as tenacious and fearless as him in our corner. He went toe-to-toe with other leaders in the demand for transparency and accountability.

Last but certainly not the least, a huge thank you to our amazing Executive Director, Robin. The amount of work she takes on to allow us to volunteer is incredible. Not only is she planning all our events, organizing presenters, and fielding all our questions, she also serves as the ED representative on the Board of Component Representatives (BCR) and has served as a project manager for statewide program rollouts. She is truly the MVP and we are so grateful to her.

If you have questions or concerns about any of these points or have something you want us to raise to CDA awareness, please reach out. Together we are stronger, and with 26,000 dentists in California, we can be the change we want to see.

It has been a pleasure and honoring serving as your President this past year. Wishing you and your families a very Happy Holidays and a bright new year,

Alexandra Hebert

*Note: Minutes from the 2024 House of Delegates are included on Page 20)*



Drs. David Walls, Andrew Smith, Matt Swatman, Alexandra Hebert, Natalie Lenser, ED Robin Brown, Drs. Joe Kolody, Christina Lee Zertuche, Filipe Lima



Drs. Andrew Smith, Natalie Lenser, Alexandra Hebert, Joe Kolody, Christina Lee Zertuche, Filipe Lima



President Dr. Alexandra Hebert



## Advancements in Technology

Andrew Smith, DDS  
SDS Editor

The rapid pace of technological advancements in dentistry is transforming the field, enhancing patient care, and streamlining practice operations. From AI-powered diagnostic tools and 3D printing for custom restorations, to advanced imaging systems like CBCT and teledentistry platforms, these innovations are enabling more precise, efficient, and personalized treatments. Digital workflows are reducing treatment times and improving accuracy, while innovations like laser dentistry and CAD/CAM technology elevate patient comfort and outcomes. As these tools become more accessible, they are redefining what is possible in modern dental practice, empowering clinicians to deliver higher-quality care than ever before. Below are select articles gathered from both the JADA Foundational Science journal and Wiley's Dental Traumatology highlighting innovative changes in technology that can translate into stream lining, handling and manufacturing sports mouth-guards.

Links:

JADA: [Position Statement and Recommendations for Custom-Made Sport Mouthguards Link:](#)

Wiley: [Disruptive innovation events in dentistry](#)

Andrew Smith, DDS  
SDS Editor

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# General Membership Meeting-October

## What is Your Team Doing That is Putting Your Practice at Risk?

Theresa Sheppard, RDA



The gang's all here!



Jose Virrueta  
Integrity Practice Sales









Merrill Lynch and Bank  
of America representatives



Nick Dennehy  
Dennehy Dental



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## SDS 2025 BLS Renewal Courses

DATE	TIME
<u>Friday, January 3</u>	<u>9:00am – 12:00pm</u>
<u>Friday, February 7</u>	<u>9:00am – 12:00pm</u>
<u>Friday, March 7</u>	<u>9:00am – 12:00pm</u>
<u>Friday, April 4</u>	<u>9:00am – 12:00pm</u>
<u>Friday, May 9</u>	<u>9:00am – 12:00pm</u>
<u>Friday, June 6</u>	<u>9:00am – 12:00pm</u>



Download registration form [www.stanislausdental.org](http://www.stanislausdental.org)



## Robin's Relevant Remarks

What a world, what a world! 2024 certainly brought its challenges but we're still here! A couple of highlights:

### House of Delegates

Your SDS member delegates and alternate delegates were amazing and represented you well. They were well-versed and not shy about sharing their opinions; not easy standing in front of a room of over 250 seasoned peers! I was so proud! Make sure to review the minutes (Page 22) from the 2024 CDA House of Delegates (Resolution 3, yay!).

### Social Get Togethers

Our first pop up was a wonderful success. We more than doubled our regular holiday mixer attendance! Look forward to more personal member social gatherings in 2025. Do you have a suggestion of what type of events might interest you and your peers? Let your BOD or me know!

### Member Community Engagement

I know we have many unsung dental heroes in our midst who volunteer their time and talents to serving those in need in our community and beyond. If you, maybe with the help of dental team members, serve others in some capacity, please let me know. Perhaps you would like others in our community to help lend a hand and I can help facilitate that by sharing your information in my regular member email blasts. Whatever it is you do, I would like you to send me photos of your endeavor with a little information to share with our members. We would like to celebrate you and you may find others who share a similar passion and would like to help in the future!

May the Holidays and the New Year bring you and those you love peace and joy.

Robin Brown / Executive Director

So proud to be a part of...

...SDS members (and team) preserving the dental health of the earth's population, one patient at a time!

## EDD: 2025 Contribution Rates, Withholding Schedules, and Meals and Lodging Values

### Contribution Rates

Your Unemployment Insurance (UI) and Employment Training Tax (ETT) rates are combined on the *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088). The State Disability Insurance (SDI) tax rate can be found by visiting [Tax-Rated Employers](#). We will mail your DE 2088 in December and you can get a copy by logging in to [e-Services for Business](#).

### UI Rate

The UI rate schedule for 2025 is Schedule F+. This is Schedule F, plus a 15 percent emergency surcharge, rounded to the nearest tenth. Schedule F+ provides for UI contribution rates from 1.5 percent to 6.2 percent. The taxable wage limit is \$7,000 per employee, per calendar year.

For more information, review [Tax-Rated Employers](#).

### ETT Rate

The ETT rate for 2025 is 0.1 percent. The ETT taxable wage limit is \$7,000 per employee, per calendar year.

### SDI Rate

The SDI withholding rate for 2025 is 1.2 percent. Effective January 1, 2024, [Senate Bill 951](#) removes the taxable wage limit and maximum withholdings for each employee subject to SDI contributions.

For past tax rates and taxable wage limits, refer to [Tax Rates, Wage Limits, and Value of Meals and Lodging \(DE 3395\) \(PDF\)](#) or [Historical Information](#).

### Withholding Schedules

[2025 Withholding Schedules - Method A – Wage Bracket Table Method \(PDF\)](#)

[2025 Withholding Schedules - Method B – Exact Calculation Method \(PDF\)](#)

[More details](#)





# Required Continuing Education

## OSHA/Infection Control

with

*Joy Brack, RDA*

**Wednesday, January 22**

**6:00pm – 9:00pm**

**3 Hours Core CEU's**

**Live Virtual Zoom**



## Dental Practice Act

with

*Joy Brack, RDA*

**Thursday, January 23**

**6:00pm – 8:00pm**

**2 Hours Core CEU's**

**Live Virtual Zoom**



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# Halloween Office Shenanigans!



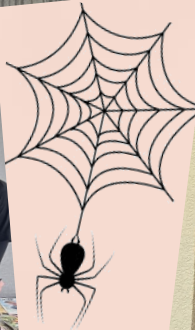
Sonia Arevalo DDS



Mital Patel, DDS



Peter Soderstrom, DDS



David Woodill, DDS

## SHENANIGANS



BECAUSE LIFE IS MORE FUN  
WHEN YOU ARE UP TO  
SOMETHING

Jeff Barton, DDS



# CDA member practice owners to receive updated labor law posters in 2025

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As part of CDA's ongoing efforts to support member-dentists in their roles as practice owners and California employers, new sets of required posters will be available at no cost in the spring of 2025. These easy-to-display poster sets contain the specific health, safety and employee rights information required by state and federal agencies. The posters must be displayed in a place highly visible to employees.

As a benefit of membership, CDA develops and distributes these dental-specific sets of required postings for dental offices. There is no cost for the first set; additional poster sets are available for purchase with member-only pricing.

CDA members are encouraged to sign in to [My Account](#) on [cda.org](#) to verify the correct and preferred mailing address and practice ownership information.

## 11 posters should be printed and posted now

To ensure members have postings that keep pace with the latest regulations, CDA's compliance and employment experts regularly review the poster set and post updates online between printings. Until the 2025 poster sets are mailed, practice owners should print and post the following updated notices to the 2023-2024 set:

1. [Your Employee Rights Under the Family and Medical Leave Act](#) (50+ employees)
2. [Federal Minimum Wage](#)
3. [Employee Polygraph Protection Act](#)
4. [Know Your Rights: Workplace Discrimination is Illegal](#)
5. [Healthy Workplaces/Healthy Families Act: California Paid Sick Leave](#)
6. [California Law Prohibits Workplace Discrimination & Harassment](#)
7. [Wages, Hours and Working Conditions in Professional, Clerical, Mechanical and Similar Occupations](#)
8. [Safety and Health Protection on the Job](#)
9. [California Minimum Wage](#)
10. [Health Care Worker Supplemental Minimum Wage](#)
11. [Notice to Employees—Injuries Caused by Work](#)

Details on the [Required Employment Poster Sets](#), including ordering information, links to posters that dental offices are required to display and summaries of the respective laws and posting requirements are available in one place on CDA's website.

CDA's compliance experts strongly encourage dentists to periodically review poster updates for any new or changed requirements. Displaying the current posters not only ensures regulatory compliance but also promotes transparency within the workplace.

## CDA's sample written plans, forms assist compliance

- CDA members can access additional resources to achieve compliance in the new year:
- [Regulatory Compliance Manual](#): Includes sample written plans and forms to help dental practices comply with Cal/OSHA plus practical information about current regulations.
- [Regulatory Compliance Checklist](#): A checklist of actions to comply with the Dental Board of California, occupational safety, employment, environmental, radiation safety, patient privacy, information security, and general business requirements.
- [Virtual Member Meeting: Navigating New Laws That Impact Your Dental Team](#): A live webinar on Jan. 22, 2025, will detail CDA's recent advocacy efforts that led to new RDA licensure pathways and allowable duties for dental assistants in California. Registration is required.

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# Tis the Season: Pay Considerations for Holiday Closures

Giuliana Gabriel, J.D., Vice President of Human Resources | December 5, 2024



While some companies are busier than ever during the holiday season buzz, for others, December represents a “slowdown”—a time for rest, hibernation, and festivities. Many employers even shut down for a week or more until the New Year rolls around, and some require the use of vacation time to bridge the gap. However, there are important considerations to keep in mind during holiday closures, particularly when it comes to **exempt employee pay** and **vacation policies** in California.



## Pay Considerations

Employers have discretion over whether they will pay non-exempt (hourly) employees during holiday closures. As such, your handbook policies should outline when you are closed for a holiday or a particular time of year, whether employees will receive holiday pay, and if a particular holiday is worked, whether you will pay a premium (i.e., a higher rate of pay per hour).

Holiday closures are a little trickier for exempt (salaried) employees. Remember, to maintain exempt status under the executive, administrative, and professional exemptions, the employee must be paid their full salary for a workweek in which they perform **any** work. This is known as the “salary basis” rule.

Therefore, if you are closing for less than a full workweek, you must still pay your exempt employees their full salary whenever they are ready, willing, and able to work. You are not allowed to pro-rate their salary if you close for a holiday. One exception is if your business closes for a **full workweek**, and you ensure that the exempt employee **performs no work** that week, then you would not be required to pay them their salary for that period. However, if the exempt employee even just checks a few emails or makes a work call, they must be paid their *entire salary* for the week. As such, make sure your expectations are clear and take steps to ensure absolutely no work is performed (e.g., block access to server/emails, take work phones/company laptops, etc.).

## Pro Tip: Defining the Workweek

Be sure to check how your policy defines the workweek, as this will determine whether exempt pay is owed. Let’s go over an example. This year, Christmas through New Year’s Eve falls on a Sunday through Saturday. If the employer defines their workweek as “Sunday through Saturday” and closed during that week, they would not have to pay exempt employees (so long as no work is performed). However, if the workweek is defined as “Tuesday through Wednesday,” then the employer would not be closed for an entire workweek (the closure would be split between multiple workweeks). In that case, exempt employees would still be owed their full salary.

There are limited exceptions when an employer is permitted to pro-rate an exempt employee’s salary. CEA members may refer to our **Exempt Employee Deductions Fact Sheet** on our [HR Forms page](#).

## Vacation Policies

Many employers also want to know whether they can *require* the use of vacation time during holiday closures. The benefits include lowering vacation balances on the books, avoiding disruption with healthcare premium pay deductions, etc.

The answer is yes, *but* employers need to ensure **reasonable advance notice** whenever they require employees to use vacation time. The California Labor Commissioner has determined that **90 days** constitutes reasonable advance notice. As such, it is recommended that employers put employees on notice in their handbook policies, and remind employees at least three months in advance of any company shutdowns or closures when vacation use is required.

If an employee is currently out on a leave of absence, proceed with caution in requiring the use of vacation time during a closure. For some leaves of absence, the employer **cannot** require an employee to use their vacation time (pregnancy disability leave is one example). Also remember, employers should never require employees to use their mandatory paid sick time.

There are a lot of considerations when it comes to employment policies. Let us make it easy for you with our updated 2025 Employee Handbook. We have a [do-it-yourself option](#) for purchase, or [we can customize it for you](#) from start to finish! Give us a call at 800.399.5331.

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# General Membership Meetings



**February 20**

## **Labor Law Updates**

with Michelle Coker, PHR, PHRca  
CDA Employment Practice Analyst



**May 8**

## **Risk Management Essential Concepts**

with Taiba Solaiman, PHR, RDA  
TDIC Sr. Risk Management Analyst



**October 16**

**TBD**

SDS General Membership meetings are a free SDS member dentist perk. Meetings include meals, CE credits, raffle opportunities, and an opportunity to socialize with peers and build friendships.

Advance registration and check-in are required. Informational fliers are included on the SDS website, [www.stanislausdental.org](http://www.stanislausdental.org).

CDA members outside of SDS and non-member dentists are welcome to attend but will need to pay a fee. Inquire at the SDS office for more information.

# Navigating the Risks of AI-Enhanced Dentistry

December 10, 2024



The integration of AI into dentistry is an exciting advancement that holds promises of improved patient outcomes and streamlined operations. TDIC's Risk Management analysts explain the risks associated with AI use and share tips for mitigating those risks.

Artificial intelligence offers innovative solutions for diagnosis, treatment planning and patient management in dentistry. Its integration also brings forth risks that dentists must be vigilant about to ensure patient safety and trust while minimizing their exposure to liability. The Dentists Insurance Company's [Risk Management Advice Line](#) analysts point out that understanding these risks and adopting best practices to mitigate them is crucial.

## Understanding AI

AI applications in dentistry range from AI-powered imaging systems to robotic surgical assistants. Have you integrated any of these common or emerging uses in your practice yet?

### Common uses:

- **Diagnostics and imaging:** AI algorithms can analyze dental images like radiographs and 3D scans to identify dental caries, cancerous lesions and other abnormalities with high accuracy.
- **Treatment planning:** AI can help to create precise treatment plans by analyzing patient data, leading to efficient and personalized dental care.
- **Automated scheduling:** AI systems can manage appointments, reducing no-shows and optimizing schedules for patients and dental staff.

**Patient engagement:** AI-powered chatbots and virtual assistants can provide patients with instant responses to inquiries, improving responsiveness and service satisfaction.

### Emerging uses:

- **Predictive analytics:** AI can predict oral health issues before they arise by analyzing patterns in data, assisting in anticipating potential complications and facilitating preventive care.
- **AI-powered robotics:** Advanced robotic systems can assist in delicate procedures like ideal dental implant positioning, ensuring precision and reducing procedure time.

**Teledentistry:** AI can support online consultations, enabling remote diagnostics and consultations and expanding access especially to rural areas.

## Key Risks of AI in Dentistry

Each of these technologies has the potential to significantly enhance diagnostic precision and treatment outcomes. Yet, each comes with its own set of challenges.

**Data privacy concerns.** AI systems require vast amounts of patient data to learn and function effectively. This can raise significant data privacy and security issues, making sensitive patient information vulnerable to breaches.

**Diagnostic errors.** While AI can enhance diagnostic capabilities, it's not infallible. If AI is used in diagnosis or treatment planning, the dentist must ensure that the AI recommendations meet the established standard of care to avoid potential liability. Reliance on AI for diagnosis without proper clinician input can lead to errors due to misinterpretation by the AI algorithms or due to biases in the data used to train the AI.

**Algorithm bias.** AI tools may exhibit bias if trained on nonrepresentative datasets, leading to unintended racial or ethnic disparities in treatment outcomes. Without diverse data training sets, providing fair treatment options for all patient demographics may be difficult.

**Lack of human oversight.** Overreliance on AI systems might lead to a lack of necessary human oversight. Dentists must remember that AI is a tool to assist — not replace — their professional judgment.

**Ethical and legal implications.** The use of AI in dentistry comes with ethical considerations, such as transparency about the use of AI technologies in patient care. Additionally, liability in cases of malpractice involving AI decisions is a legal gray area.

**Integration and usability issues.** Integrating AI systems into existing dental practice workflows can be challenging. There might be a steep learning curve, or AI systems may not seamlessly integrate with existing technologies.

(cont. Page 16)



## Mitigating AI-Related Risks

AI's potential to improve patient care and optimize dental processes is immense. However, successful integration relies on the ability to manage associated risks effectively.

To reduce the possibility of malpractice claims related to AI use, consider these strategies:

**Strengthen data security measures.** Invest in advanced cybersecurity solutions to protect patient data. Regular audits and compliance with HIPAA and other relevant standards are necessary to safeguard privacy.

- **Train and educate.** Continuous training on AI tools is essential. Ensure that all members of the dental practice team are well-versed in interpreting AI outputs and understanding the system's limitations. Cross-disciplinary collaboration involving technologists and clinicians can bridge knowledge gaps.

- **Maintain human oversight.** Treat AI as an advisory tool. Regularly verify AI-generated insights with traditional diagnostic methods and clinical judgment. Establish protocols for human intervention whenever AI tools flag unusual patterns or anomalies.

- **Establish clear ethical guidelines.** Develop and adhere to ethical guidelines for AI use, ensuring transparency with patients regarding AI involvement in their care. Obtain informed consents that explicitly cover AI use.

- **Clarify legal responsibilities.** Work with legal experts to define clear liability boundaries for your practice. Establishing protocols for AI use, including decision-making and documentation, can clarify responsibilities and reduce legal uncertainties.

- **Integrate thoughtfully.** Approach AI integration with careful planning. Involve IT professionals from the start and ensure interoperability with existing systems to minimize disruption and enhance usability.

## The Future of AI in Dentistry

The integration of AI into dentistry is an exciting advancement that holds promises of improved patient outcomes and streamlined operations. AI has the potential to be a strong ally in delivering the highest standard of dental care — one that augments human expertise rather than diminishes it.

However, dental professionals must adopt robust strategies to mitigate potential new risks while embracing technological advancement. Through diligent oversight, education and compliance, dentists can embrace practice-changing innovation.

When questions or concerns about emerging technologies or other practice challenges arise, consult TDIC's Risk Management Advice Line.

*TDIC's Risk Management Advice Line is a benefit to TDIC policyholders. To schedule a consultation with an experienced Risk Management analyst, visit [tdicinsurance.com/RMconsult](https://tdicinsurance.com/RMconsult) or call 877.269.8844.*

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# Member & Guest Pop Up!

What a remarkable event! There were so many attendees we filled the room! Newer members, retired members, new friendships formed, and old acquaintances renewed. The Board thanks all those that attended and is looking forward to even more member engagement at our next social!





# Training Your Dental Practice Team to Combat Cyber Threats



You and your practice staff are already on the frontlines of the fight against tooth decay. During your training to become dental professionals, you likely didn't expect the need to master fighting cybercrime as well.

In the digital age, dental practices must fortify their defenses against evolving cyber threats. The good news is that the skills necessary to prevent cyberattack are not unlike those needed for establishing an oral health routine. Education, regular care and healthy habits top the list.

Here are several ways dental practice owners can empower their teams to enhance cybersecurity:

**Education on common threats.** Initiate training by educating your staff about prevalent cyber threats. Provide examples of phishing emails, ransomware and other types of cyberattacks to illustrate how these threats can manifest in a dental practice setting. Offer insights into the tactics cybercriminals use to deceive and compromise systems. One great resource comes from the podcast "Nobody Told Me That!" In [episode 113](#), Teresa Pichay of the California Dental Association and Colette Johnson of TDIC share real-life stories and offer valuable insights into protecting sensitive patient information and staying compliant with HIPAA regulations.

Cybersecurity is an ongoing effort. Regular training and education are crucial to keep your practice team ahead of the evolving risks.

**Regular training sessions.** Conduct periodic training sessions to keep your staff updated on the latest cybersecurity practices and threats. Cybersecurity is an evolving landscape, so continuous education is key. Encourage active participation and provide resources to reinforce the training material.

**Simulated phishing exercises.** Implement simulated phishing exercises to test your staff's ability to recognize and respond to phishing attempts. This hands-on approach allows employees to experience real-life scenarios in a controlled environment, helping them identify red flags and respond appropriately. Many cybersecurity consultants offer [security awareness training and simulated phishing exercises](#).

**Establish protocols and reporting mechanisms.** Make sure your staff have clear protocols to follow in a suspected cyber threat. TDIC's [Cyber Event Checklist](#) is a good place to start when establishing your own protocols. You can also post in your office the seven steps to take if you experience a cyber breach (see [Liability Lifeline 2023 Volume 3](#), page 11). Encourage open communication and provide a straightforward reporting mechanism for any potential security concerns. Ensure all staff members understand the escalation procedures.

**Access control and password management.** Train your staff in secure access control and password management. Emphasize the importance of strong, unique passwords and the necessity of regularly updating them. Implement two-factor authentication for added security. To assist in creating and using strong passwords, consider using a password-saving program like [LastPass](#) or [1Password](#).

**Software updates and patch management.** Educate your team on the significance of timely software updates and [patch management](#). Ensure they understand the role these updates play in fixing vulnerabilities and protecting the practice's systems. Patch management is simply the process of applying updates to software, drivers and firmware for protection against possible weaknesses. In addition to enhancing security, patch management also guarantees the best operating performance of digital systems, boosting practice productivity. You can work with your IT provider on patch management, or a class of software called "managed services" can automate the process for you.

**Cybersecurity best practices in patient interactions.** Train staff on maintaining patient data confidentiality and secure data transmission. Highlight the significance of secure communication channels and the secure handling of patient information.

It doesn't take a cape or mask to fight cybercrime. Cybersecurity is an ongoing effort, and regular training and education are crucial to staying ahead of the evolving risks. For additional protection, risk management experts recommend investing in the services of online security consultants, industry webinars and online training platforms that offer cybersecurity courses tailored for health care professionals.

TDIC policyholders can [contact the Risk Management Advice Line](#) for additional guidance.

*TDIC's Risk Management Advice Line is a benefit to TDIC policyholders. To schedule a consultation with an experienced risk management analyst, [visit tdicinsurance.com/RMconsult](https://www.tdicinsurance.com/RMconsult) or call 1.877.269.8844.*

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# RDA EXAM PREP COURSE

“LIVE” REGISTERED DENTAL ASSISTANT  
EXAMINATION BOOTCAMP



Enhance your career by becoming a licensed dental professional. Learn to perform expanded duties, boost your career opportunities, and increase your earning potential.

## COURSE HIGHLIGHTS

- 🦷 **One-Day, Live Class Session:** Interactive and focused preparation for the RDA exam.
- 🦷 **Required Book:** The California RDA General Written and Law Examination by Colleen Kirby (must be purchased separately and brought on the first day of class).
- 🦷 **Application Support:** bring all completed RDA application documents required by the Dental Board of California to minimize submission errors (Review DBC website for the RDA exam).
- 🦷 **Study Materials:** Bring your materials to maximize preparation for the exam.
- 🦷 **Includes a 1-hour lunch break** during the course.

## COURSE INFORMATION

**Date:** January 17, 2025

**Time:** 8:30 a.m. – 4:30 p.m. (1-hour lunch break)

**Location:** Modesto Junior College, West Campus

**Fee:** \$170.00 (book required but not included)

**Registration Deadline:** January 10, 2025



Scan to register

Questions? Reach out today!

MJC Dental Assisting Program

 [perezhernandezl@mjc.edu](mailto:perezhernandezl@mjc.edu)

209-575-6201

# Minutes of the 55th Annual Session of the California Dental Association (CDA) House of Delegates



Los Angeles Airport Marriott | November 8-9, 2024

Elections: In 2021, the house adopted Resolution 1-2021-H (Board Composition), honoring the officer elections that had already occurred including Dr. Max Martinez, president for 2025. As such, there were two open positions for the 2024 election – secretary and speaker-elect.

In response to the contested speaker-elect position, the house elected Dr. Gary Glasband by vote of 126 (64%) for Dr. Glasband to 71 (36%) for Dr. Martin Courtney. This election finalized the action of the house, adopting the following resolution:

Resolution 1-2024-H, CDA Officer Elections: Resolved, that the following candidates be elected officers of the California Dental Association:

Secretary (2025)..... Dr. Joan Otomo-Corgel

Speaker-Elect (2025), Speaker (2026-2028).....Dr. Gary Glasband

Resolution 2RC-2024-H, Establishment of CDA Membership Committee was pulled from consent, the committee composition amended, and resolution adopted by card vote:

Resolved, that the Council on Membership be eliminated, and be it further

Resolved, that a CDA Membership Committee be established, and be it further

Resolved, that the CDA Bylaws and General Operating Principles be amended to reflect these changes.

Resolution 3-2024-H, Establishment of CDA Council on Professionalism and Mediation was adopted on consent as follows:

Resolved, that the CDA Judicial Council and Peer Review Program (including the Council on Peer Review) be eliminated, and be it further

Resolved, that a Council on Professionalism and Mediation be established, and be it further

Resolved, that the development of a mediation program for CDA members be approved, and be it further

Resolved, that the CDA Bylaws and General Operating Principles be amended to reflect these changes.

Resolution 4-2024-H, Establishment of CDA Dues was adopted by vote of 111 (56%) in favor and 87 (44%) in opposition:

Resolved, that 2025 CDA Active Member dues increase by \$100 to \$986.

Resolution 5-2024-H, Equal and Fair Representation on the Board of Component Representatives was adopted on consent as follows:

Resolved, that a component dental society, whose Board of Component Representatives member is elected chair, have the option to designate a second member to serve as their Board of Component Representatives member for that calendar year, and be it further

Resolved, that the CDA Bylaws and General Operating Principles be amended to reflect these changes.

Resolution 6-2024-H, Inclusion of Board of Component Representatives at House of Delegates was adopted by card vote as follows:

Resolved, that if a local dental society does not elect their Board of Component Representatives member as a delegate or alternate delegate for the CDA House of Delegates, the dental society be urged to include the member as a non-voting participant, and be it further

Resolved, that the Board of Component Representatives members be seated with their delegation and have speaking privileges on the floor of the house, regardless of their status as a delegate or alternate delegate, and be it further

Resolved, that the CDA Bylaws and General Operating Principles be amended to reflect these changes.

(cont. Page 22)

(cont. from Page 21)

Resolution 7RC-2024-H, California Response to ADA Strategic Forecast and Membership Model was adopted by vote of 154 (84%) in favor and 29 (16%) in opposition:

Resolved, that a task force be charged with evaluating the California implications of the ADA strategic forecast as approved at the 2024 ADA House of Delegates and the ADA membership model, and be it further

Resolved, that the task force recommend how CDA and the California local dental societies respond to ADA's implementation of these plans ensuring that ADA, CDA and the local societies are best positioned to serve the unique needs of members and the profession in California well into the future while remaining committed to a collaborative approach within the tripartite, and be it further

Resolved, that the task force include at least one member from each of the following categories: CDA leadership, CA local dental society leadership, 2024 13th District delegation, current CA ADA Council members, CA local dental society executive directors, and be it further

Resolved, that the task force include a mix of early career dentists (0-10 years in practice) and mid-career dentists (11-25 years in practice), and be it further

Resolved, that the task force share progress reports and findings with the CDA Board of Directors, Board of Component Representatives, 13th District Delegation and the 2025 CDA House of Delegates.

Resolution 8-2024-H, Dental Plan Leasing was pulled from consent and adopted by card vote as follows:

Resolved, that the appropriate CDA entity consider possible legislation to require an opt in agreement rather than the existing opt-out requirement between a dental plan and the provider when a dental plan leases a network to another dental company/plan, and that upon a request to opt-in from an existing dental contract, accompanying fee schedules be provided.

Resolution 9-2024-H, Motion to Close Debate was defeated by vote of 53 (28%) in favor to 135 (72%) in opposition.

Resolution 10-2024-H, Honorary Membership for Lee Adishian was adopted by general consent.

Resolved, that the San Gabriel Valley Dental Society executive director, Lee Adishian, be elected as an honorary member of the California Dental Association.

Resolution 11-2024-H, Honorary Membership for Debi Diaz was adopted by general consent.

Resolved, that the Monterey Bay Dental Society executive director, Debi Diaz, be elected as an honorary member of the California Dental Association.

Resolution 12-2024-H, Evaluating California Dentists' Role as Primary Care Providers of Obstructive Sleep Apnea (OSA) and Snoring Without OSA (SNORING) was pulled from consent and defeated by card vote.

Resolution 13RC-2024-H, Evaluation of Fluoride Containing Products was adopted by card vote as follows:

Resolved, that the CDA Board of Directors and management be urged to communicate and request that the appropriate ADA entity support research and conduct a comprehensive evaluation of the safety, effectiveness and accessibility of all fluoride containing products including, but not limited to, community water, bottled water, table salt, dietary supplements, topical applications and over the counter products.

Resolution 14-2024-H, Process to Appeal Out of Order Resolutions was adopted on consent as follows:

Resolved, that the California Dental Association develop and implement a process for appealing the chair's decision on out of order resolutions for the CDA House of Delegates, when appropriate, to ensure reasonable deliberation and discussion time, and provide a fair opportunity for debate and voting on successfully appealed resolutions; and be it further

Resolved, that the approved process be posted at least 30 days prior to the 2025 House of Delegates and implemented beginning in 2025.

Resolution 15-2024-H, 2024 TDSC Historical Workgroup report was pulled from consent and adopted by vote of 157 (84%) in favor and 29 (16%) in opposition.

Resolved, that the 2024 TDSC Historical Workgroup Report with all appendices be filed by the CDA House of Delegates to provide a historical record of events pertaining to the TDSC venture for CDA members.

Adjournment of the House of Delegates: There being no further business, the speaker declared the house adjourned sine die at 3:33 p.m.



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At **The Dentists Insurance Company**, our experts are here to help make insurance less puzzling. Our New Dentist Programs keep you covered and confident in your early years. It's easy with a **\$50** premium for your first year of Professional Liability coverage,\* plus:

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\*First-year applicants must meet eligibility criteria. TDIC Professional Liability coverage premiums are \$0 in AZ and IL, \$50 in ID, TN, MT, OR, WA, AK, CA, HI, MN, NJ, NV, ND and PA. Premiums depicted are for new and never-practiced dentists, licensed within the last 12 months and are valid for \$1M/\$3M coverage amounts through our Claims-Made Policy. These premiums are not eligible for additional discounts. Premiums increase until a mature policy is reached. Applicants who are not eligible for \$0 or \$50 TDIC Professional Liability coverage premium listed above may be eligible for discounts up to 45% in year 1. \*\*Applicants must meet eligibility criteria to qualify for premium discounts up to 45% in year 2 and 25% in year 3. Premium and discounts may vary in WA.



## Service from the Heart!

by SDS member, Dr. Gladys Gesicho

The KenyaAmerica Rural Dental Outreach (KEARD) has been providing free preventive dental services to undeserved communities in both the United States and Kenya for five years now. HENRY SCHEIN CARES has been very supportive by donating free tooth brushes, toothpaste, floss, varnish sealants other instruments.

On 11/23/24, Dr. Gladys Gesicho and Dr. Linda Lee provided these services at Dr Gesicho's office, Hawkeye Family Dental in Turlock. Registered dental assistant volunteers assisted in the health services while board members helped with clerical work.

It included examinations, oral health education and instructions, prophylaxis, varnish and sealant placement. Cases of visible caries had recommendations to have the necessary dental treatment at a later date.

The next KEARDO Mission to Kenya is this December.

Follow their adventures:

<https://www.keardo.org/>



## José M. Virrueta

Central California Practice Sales  
*Practice Sales Agent*

### Curious about the value of your practice in 2024?

Contact me to get started with a **confidential** discussion about your transition options in 2024. Whether you're looking at a doctor-to-doctor sale, DSO, private equity, or partnership, I can help you navigate the market in 2024 to get you **top dollar for your practice**.

☎ (925) 382 - 9525    ✉ [jose@integritypracticesales.com](mailto:jose@integritypracticesales.com)

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José is a seasoned professional with an impressive 24-year journey in the dental industry. Throughout his career, José has significantly impacted the lives of his customers, assuming various roles and steadily climbing the ladder to a successful and fulfilling sales career with some of the nation's top dental supply companies.



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# IT'S TIME TO renew.

## Pay your dues how it works for you!

Make a payment online or enroll in autopay by December 31 to break your dues into easy recurring monthly payments.

With autopay, your dues payments are deducted from your chosen bank account or credit card on the 15th of each month, and your membership automatically renews each year.

## Here's how to sign up:

1. **Sign in** to My Account on [cda.org](https://cda.org).
2. **Select Renewal Orders** from the menu and then select Pay Now.
3. When prompted to choose a payment option, choose **Monthly payments** (1 year) and click Proceed.
4. **Follow the prompts** for any voluntary contributions. If no contributions are being added, click Continue.
5. **Select or add** your saved payment method, select Process Payment and you're done!

Enjoy the convenience of automated payments!



 SCAN ME

# Stay connected to your benefits

**Manage your membership online, any time!**

**When you sign in to My Account to renew your membership, you can also:**

- Check that your contact information is current, so you don't miss out on news from CDA and your local dental society.
- Complete your Practice Information if you're an owner so that we're better able to connect you to benefits that are relevant and of interest.
- Use the same email and password to access member-only resources, online learning offerings and more!

Learn more about your online account features at [cda.org/account-overview](https://cda.org/account-overview).



 SCAN ME

# Help is one call away.

## The CDA Well-Being Program

If someone you know or love may have an alcohol or chemical dependency problem, contact a support person near you for 24-hour confidential assistance.

### Central California Well-Being Committee

916.947.5676 (cell)

### Stanislaus Dental Society

209.552.1530

### California Dental Association

800.232.7645



SDS member, Dr. Michael Shaw is the SDS Well-Being chair, [drshaw@drmps.com](mailto:drshaw@drmps.com)

Please contact him should you, or any member you know, have a need.



# Licensure and scope changes will affect California dental practices in 2025

Reprinted with permission from California Dental Association

Legislation signed into law this year will bring significant changes to dental practice, licensure and permitting in California starting Jan. 1, 2025.

The new requirements, shaped by CDA's advocacy, address key issues for members such as expanding the workforce to address staffing challenges, anesthesia permit qualifications for dentists and infection control standards for dental assistants. These updates aim to modernize dental practice, ensuring that dentists and dental assistants are equipped to meet the evolving needs of professionals and patients across the state.

## Changes impacting dentist licenses and permits

### Adult minimal sedation requirements

In partnership with the California Society of Pediatric Dentistry, CDA successfully advocated for pediatric dentists to be able to use their pediatric residencies to qualify for adult minimal sedation permits. This loophole was an unintended consequence of legislation passed in 2018 (SB 501, Glazer).

### General anesthesia permits

Dentists holding general anesthesia permits will now be required to complete Advanced Cardiovascular Life Support training during each renewal period in addition to the Basic Life Support requirements for their dentist license.

### Nonclinical licensure by credential pathway

Dentists licensed in another state who practice nonclinically for a specified time in a role that requires an active dentist license (such as dental public health) will now be eligible to apply for a California license using the licensure by credential pathway.

### Qualifying C.E. courses in mental health, DEI

Continuing education that is focused on mental health and wellness or the impact of diversity, equity, and inclusion on the delivery of dental services will qualify as "core" C.E. when offered by a qualified provider.

### Fictitious name permits

Previously, dental practices applying for a fictitious name permit had to list the term "dental group/practice/office" in addition to the family name of one or more past, present or prospective members of the group. Beginning Jan. 1, dental practices with an FNP no longer need to have an owner's family name associated with the practice name, but it must contain "dental group, practice, office, or corporation."

### License and permit posting requirements

Licenses and permits for all licensed dental professionals and certificates of completion of board-approved radiation safety and coronal polishing courses for unlicensed dental assistants must be publicly displayed within the dental practice or facility where treatment is being provided.

## Changes impacting dental assistants

### New requirement, format change for eight-hour infection control course

Beginning Jan. 1, 2025, and regardless of their hiring date, unlicensed dental assistants must complete the required eight-hour infection control course prior to exposure to blood and saliva. The new required timeline for completing the course replaces the current requirement that the course be completed within the first 120 days of employment.

The Dental Board of California unanimously supported this change to prioritize infection control standards coming out of the pandemic and after years of advocacy from various dental assisting communities.

To make compliance easier for dentists throughout the state, CDA successfully advocated for changes in the course format so that now it can be offered virtually and on-demand. CDA is developing a plan to offer the course as a member benefit in the second half of 2025. CDA will also partner with local dental societies to conduct the course regionally with approved training providers. Dentists can search for dental board-approved providers of the eight-hour infection control course in their area.

*Major updates to dental licensure, anesthesia permits, required infection control course will modernize care*

(cont. on Page 27)

## Coronal polishing duty expansion for unlicensed dental assistants

Unlicensed dental assistants who successfully complete a board-approved course will be able to perform coronal polishing under direct supervision.

CDA originally sponsored this legislation in 2022 and 2023 with strong support from the California Society of Pediatric Dentists and is pleased to see this duty expansion adopted with the support of the dental board. Certificates of completed coronal polishing courses should be publicly displayed within the dental practice or facility where treatment is being provided.

## Changes to Dental Practice Act

### Radiation safety course may focus on digital X-rays

The dental board sunset bill updated many parts of the Dental Practice Act, including requirements for radiation safety courses.

Beginning Jan. 1, program directors approved by the board to provide radiation safety coursework can decide whether to continue to provide instruction on film radiography or to exclusively teach digital X-rays. This change is a response to the profession's shift toward using digital X-rays and to the financial pressures of maintaining outdated technology in course programs.

Certificates of completed radiation safety courses should be publicly displayed within the dental practice or facility where treatment is being provided.

### I/TR duties for registered dental assistants in extended functions

Under another change to the Dental Practice Act, registered dental assistants in extended functions who complete board-approved courses on radiographic decision-making and interim therapeutic restorations can perform those duties effective Jan. 1. RDAEFs will be able to take radiographs for patients not previously seen by the dentist and perform interim therapeutic restorations under specified conditions (Business and Professions Code [Section 1753.51](#)).

## Updated dental team duty chart, other resources coming

Various other changes have been made to contemporize duty statements for all licensure and permit categories for dental assistants to reflect new technologies within the profession. See [Cal. Bus. & Prof. Code Sections 1750.1](#) (unlicensed dental assistants), [1750.3](#) (Orthodontic Assistant Permitholders), [1752.4](#) (RDAs), and [1753.5-6](#) (RDAEFs).

Additionally, new pathways to RDA licensure, including a [preceptorship model](#) will take effect July 1, 2025. Creating new pathways for RDAs to become licensed as a way to help members resolve staffing challenges has been a top priority for CDA. CDA will update the dental team duty chart and other resources to reflect these changes and create new resources that outline the new pathways and requirements to obtain RDA licensure.

Get details on CDA's advocacy on other [major issues impacting California dentists](#), [recent legislative efforts](#) and successes and new and updated resources through the [newsroom](#) and weekly member newsletter.

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## Assess your well-being with Mayo Clinic tool

[The Well-Being Index](#), a confidential risk assessment developed by the Mayo Clinic to address clinicians' well-being in six areas, is now available to you at no cost to tripartite members.



# WELLNESS RESOURCES FROM THE COUNCIL ON DENTAL PRACTICE

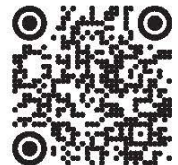


Explore [ADA.org/Wellness](https://ada.org/Wellness) for articles, courses, videos and other resources across these health and well-being areas: mental health, physical health, opioid prescribing, and pregnancy.



## Well-Being Index (WBI) [ADA.org/Well-BeingIndex](https://ada.org/Well-BeingIndex)

Your health matters. The ADA licensed the Dental Well-Being Index (WBI) — the validated risk assessment tool invented by the Mayo Clinic and used by hundreds of health care organizations — for every Member. Log into your ADA account first. Then, set-up your WBI account. The WBI takes one minute to complete and you will see your own personal dashboard and resources. You can track your well-being over time.



## ADA Dentist Well-Being Program Directory *(updated in 2023)*

[ADA.org/WellnessDirectory](https://ada.org/WellnessDirectory)

This Well-Being Program Directory provides a list of healthcare professionals in each state who will serve as a point of contact and offer support during a time of need. This is part of the ADA mission to enhance the personal and professional lives of our members for the betterment of the dental team and the patients they serve.



## After a Suicide Postvention Toolkit

[ADA.org/Postvention](https://ada.org/Postvention)

September is national suicide prevention awareness month. *After a Suicide: A Guide for Dental Workplaces* was developed in 2023 by the American Foundation for Suicide Prevention (AFSP) and the American Dental Association (ADA). This resource reflects learnings in responding to a suicide death for professional dental settings.



## ADA Ergonomic Stretches

[ADA.org/Stretch](https://ada.org/Stretch)

Better ergonomics can improve your practice — daily stretching and exercise, can help dental practitioners and their team enjoy long, healthy careers. Download the ADA Ergonomics Stretches infographic today, including 25 quick stretches, to keep you and your dental team healthy.



## ADA Wellness Videos

[ADA.org/WellnessVideos](https://ada.org/WellnessVideos)

Visit ADA's Wellness Playlist on our YouTube channel to watch new, short promotional videos on:

- ADA Dentist Well-Being Program Directory
- 2-part Resilience Webinar courses in ADA CE Online
- ADA Opioid Prescribing Resources



## 2025 SDS Calendar of Events



<b>January</b>	1	Wednesday	New Years Day (office closed)
	3	Friday	BLS renewal
	7	Tuesday	SDS Board of Directors meeting
	20	Monday	Martin Luther King Day (Fed holiday/office closed)
	22	Wednesday	CE course- <i>OSHA/IC</i> -virtual
	23	Thursday	CE course- <i>DPA</i> -virtual
<b>February</b>	7	Friday	BLS renewal
	17	Monday	President's Day (Fed holiday/office closed)
	20	Thursday	General Membership Meeting- <i>Labor Law Updates</i>
<b>March</b>	4	Tuesday	SDS Board of Directors meeting
	7	Friday	BLS renewal
<b>April</b>	4	Friday	BLS renewal
	11	Friday	CE-TBD
	17	Thursday	SDS Member Mixer - Shred-it
<b>May</b>	2	Friday	BLS renewal
	6	Tuesday	SDS Board of Directors meeting
	8	Thursday	SDS General Membership Meeting- <i>Risk Mgmt</i>
	15-17	Thursday	CDA Presents-Anaheim
	26	Monday	Memorial Day (Fed holiday/office closed)
<b>June</b>	6	Friday	BLS renewal
	19	Thursday	Juneteenth (Fed holiday/office closed)
	23rd-27th	Mon-Fri	Symposium
<b>July</b>	1	Tuesday	SDS Board of Directors meeting
	4	Friday	Independence Day (Fed holiday/office closed)
<b>August</b>	22	Friday	CE-Pearls of the Practice
<b>September</b>	1	Monday	Labor Day (Fed holiday/office closed)
	9	Tuesday	SDS Board of Directors meeting
<b>October</b>	13	Monday	Columbus Day (Fed holiday/office closed)
	16	Thursday	SDS General Membership Meeting
	17	Friday	CE course-TBD
<b>November</b>	4	Tuesday	SDS Board of Directors meeting
	11	Tuesday	Veteran's Day (Fed holiday/office closed)
	20-22	Thur-Sat	HOD-Sacramento (office closed)
	27-28	Thurs-Fri	Thanksgiving holiday (office closed)
<b>December</b>	Dec 24-Jan 2	Wed-Fri	Winter Holiday - (office closed)



# Help is one call away.

When you need an advocate for your physical, mental or emotional health, confidential assistance and peer-to-peer support are available 24/7.

CDA's Wellness Program is a member benefit that supports and advocates for the mental, emotional, and physical wellness of dental professionals and their families. The Wellness Program is led by compassionate volunteer members and recovering dentists with the assistance of dental society staff and allied health professionals.

This trusted resource extends help in a variety of ways, offering support to family members of impaired individuals and providing assistance following diagnosis and/or treatment.

Whether your wellness challenge is anxiety, depression, mental illness, physical illness or substance dependence, our volunteer members are available around the clock to offer confidential peer-to-peer support while you navigate your wellness journey.

**As a dentist, you likely balance many roles: healthcare provider, team leader, employer and colleague. Work-related stress can result in burnout, putting you at risk for depression. Some signs that you may need support to regain balance are:**

- Weight loss or gain
- Social isolation
- Insomnia
- Anxiety
- Apathy
- Feelings of hopelessness
- Thoughts of self-harm or suicide

For more information regarding the Wellness Program or for a confidential referral, please contact your local dental society or a Wellness Committee near you:

Visit [cda.org/wellness-program](https://cda.org/wellness-program) to learn more.

**Northern California**

530.898.0821

**San Francisco/Bay Area**

209.601.4410

**Central California**

916.947.5676

**Southern California**

310.487.5040

**San Diego**

562.832.2489

**California Dental Association**  
1201 K Street, 14th Floor, Sacramento, CA 95814  
800.232.7645 | [cda.org](https://cda.org)





# Resources for Managing the Dental Team

## Guidelines for Practice Success



We have compiled online resources for Guidelines for Practice Success, Managing the Dental Team to make it easier for you to locate the additional information, samples, and resources discussed throughout the module.

[Background checks](#) [PDF]

[Benefits primer](#) [PDF]

[Checklist policy manual](#) [PDF]

[Checklist retention schedule](#) [PDF]

[Compensation analysis](#) [PDF]

[Dental assistant](#) [PDF]

[Dental hygienist](#) [PDF]

[Job analysis worksheet](#) [PDF]

[Maternity leave](#) [PDF]

[New hire checklist](#) [PDF]

[New hire checklist 2](#) [PDF]

[Office manager](#) [PDF]

[Professional personal references](#) [PDF]

[Reference form](#) [PDF]

[Salary reviews](#) [PDF]

[Staff training topics](#) [PDF]

[Telephone screening](#) [PDF]

[Tips manage all employees](#) [PDF]

[Tips manage new employees](#) [PDF]

[Waiver background check](#) [PDF]

View the full content of the [Guidelines for Practice Success](#)

# Practice Support Team

When you need support navigating the business side of dentistry, CDA's experienced analysts can answer your questions about practice management, dental benefit plans, employment practices and regulatory compliance. Meet the team who have created a full library of online resources, speak on timely topics and provide one-on-one guidance by email and phone.



**Ann Milar**—*Director, Practice Support* [ann.milar@cda.org](mailto:ann.milar@cda.org) [916.554.7324](tel:916.554.7324)

Ann provides strategic direction for Practice Support's resources and initiatives while leading the team of expert analysts. She is also responsible for identifying and analyzing emerging issues for policy development and implementation on behalf of CDA's 27,000 member dentists. Ann has worked with CDA for more than 15 years and her health care experience spans 20 years of working with associations, health plans and advocacy organizations.



**Jenell Bell**-*Associate Analyst* [Jenell.bell@cda.org](mailto:Jenell.bell@cda.org) [916.554.4986](tel:916.554.4986)

Jenell has worked in the dental industry for over nine years, which has included managing multiple practices. Jenell uses her experience and passion for customer service to assist CDA members in the areas of compliance and employment.



**Katie Fornelli**—*Senior Practice Management Analyst* [katie.fornelli@cda.org](mailto:katie.fornelli@cda.org) [916.554.5308](tel:916.554.5308)

Katie specializes in dental practice management and marketing. For more than 18 years, she's worked with dentists and their teams in areas such as scheduling, collections, front office systems, case presentation, patient management, practice transitions, and dental practice marketing.



**Lisa Greer**, *Dental Benefits Analyst* [lisa.greer@cda.org](mailto:lisa.greer@cda.org) [916.554.5953](tel:916.554.5953)

Lisa specializes in several aspects of dentistry, including working with dental benefit plans, dental billing, accounts receivable, community marketing, human resources, practice management and regulatory compliance. As a Practice Analyst, she brings more than 20 years of dental industry experience to CDA, including having served as a regional collections specialist for a dental support organization that supported 70-plus California offices.



**Matthew Nelson**, *Practice Analyst* [matthew.nelson@cda.org](mailto:matthew.nelson@cda.org) [916.554.4940](tel:916.554.4940)

With over seven years of experience as an office manager, dental consultant and CDA analyst, Matt specializes in all areas of practice management, including leadership, practice systems, dental billing, human resources and practice transitions.



**Michelle Coker**, PHR, PHRca, *Employment Practices Analyst* [michelle.coker@cda.org](mailto:michelle.coker@cda.org) [916.554.4968](tel:916.554.4968)

As a certified employment law expert, Michelle specializes in assisting members with employment practices, including employee management, policy development and employment law compliance. Her time spent in private practice as an office manager gives her a unique view into the dynamics of a dental practice. Since joining CDA in 2006, Michelle has utilized over three decades of dental experience to support dentists and their practices.



**Miguel Mariona**, *Analyst, Dental Benefits and Practice Management* [miguel.mariona@cda.org](mailto:miguel.mariona@cda.org) [916.554.4936](tel:916.554.4936)

Miguel has over 10 years of dental experience from working with dental benefit plans in various roles, including customer service and provider relations, as well as managing a dental practice. Miguel's passion for providing exceptional service is evident in his commitment to CDA members when addressing their dental benefit and practice management challenges.



**Teresa Pichay**, CHPC, *Senior Regulatory Compliance Analyst* [teresa.pichay@cda.org](mailto:teresa.pichay@cda.org) [916.554.5990](tel:916.554.5990)

Teresa specializes in regulatory compliance, including information verification, documentation strategies and referral to legal references. For more than 26 years, she's worked with CDA members in the areas of occupational and environmental safety and health, HIPAA, California Dental Practice Act and other business regulations.



**Tiffany Glass**, *Project Resource Coordinator* [tiffany.glass@cda.org](mailto:tiffany.glass@cda.org) [916.554.4914](tel:916.554.4914)

As the project resource coordinator, Tiffany brings a positive and optimistic attitude while delivering and maintaining a high level of service and support to CDA members and CDA member-clients through Practice Support and its supporting website. She has over 10 years of experience working in marketing, specializing in customer care.

# Welcome New Member!



## **Ivan Georgese, DDS**

General Dentist

333 San Carlos Way Ste. A

Stockton

Universidad De La Salle '24

### SDS Members by the Number

Total: 275

Market Share: 85.4%

(Total # of dentists in Stanislaus County who are members of the tripartite (ADA, CDA, SDS))

Active – 171

(Recent graduate-Reduced dues members)

RD1 – 12 / RD2 – 12 / RD3 – 11 / RD4 – 6

Post-Grad – 3

Life Active – 20 / Life Retired – 38

Retired – 1 / Permanently disabled - 1

Non-members in county - 59