Doctor Patient Checklist : *(use for all non exam Dr appts: impression, ortho, crown seat, etc…)*
☑ *if complete,* ☒ *if not applicable,* ☐ *blank if not done*

Receptionist/Assistant	
Patient Name *At beginning of shift* ☐ Set appt complete & create claim ☐ Write balance below ☐ Print off consent form (Ext, RCT, Ortho, Implant) & ***Post Op*** form	☐ Ask if insurance changed *Pt at front desk* ☐ Update phone, address, email, picture ☐ Mark ***Patient Ready*** button

Assistant:	

Before seating pt
☐ Make sure room/floor/counter/keyboard tray clean
☐ Setup Room, open chart on left and x-rays on right. Look for each cavity.
☐ RMH & Review last entries in Progress Notes
☐ Was able to be waiting up front when pt came in

Body language interview w/ clipboard in hand
☐ Listerine pre-rinse
☐ BRT with Patient
☐ If pt recently had work, ask if it is okay, give ✈time estimate
☐ Review with patient what we are doing today. Tell, Show, Do with kids
☐ Take BP if not controlled or high risk. *(If pre-hypertension or stage one, add to line "controlled")*
☐ Ask about back massage chair/ Xbox/TV/Movie

Anesthesia
☐ Ask or see if Dr available for shot or hygiene, review w/ Dr any findings
☐ Place numbing jelly (make sure to keep it dry**,** don't leave pt w/ topical)
☐ Update Family Personal Notes in chart
☐ After 5 min dry, **if wilted** click "Dr" Button
☐ When Dr enters room immediate take out topical and suction/ not rinse/ turn button off
☐ While waiting: 1. Take PA if needed, 2. Get original crown date. 3. Clean cassette 4. Fill out lab slip
☐ Click Dr button after 5 minutes.

☐ Offer eye protection, Awesome assisting

"Please wait while we finish paperwork"
☐ Give **towelette,** verbal & written post op instructions, ask for questions
☐ Look for procedures that need changed/added *(extra surfaces +b, MODL, PA's, etc…),* Fix claim
☐ Mark appointment "Left Seat"
☐ Schedule next recall or fillings for patient and family
☐ Ask if they want a text message reminder

☐ Take family payment of | $ |
☐ Walked patient to the exit holding door.

Coordinator/Receptionist:	

After Pt is gone
☐ Look for Red Flags on claim
☐ Attach x-rays, probing, narratives, NEA
☐ If not schedule, add task to follow-up call list
☐ **Record Same Day Tx** ➔
☐ Send email asking for online review (once per family in 6 months)   _____
☐ Grey Appointment   scheduler