

## Hygiene Patient Checklist

☒ if complete, ☐ if not applicable, ☐ blank if not done

Receptionist/Hygienist				
<input type="checkbox"/> Write balance below <input type="checkbox"/> Pre-fill New Patient forms	<i>At beginning of shift</i> <input type="checkbox"/> Ask if insurance changed <input type="checkbox"/> Update phone, address, email, picture <input type="checkbox"/> Mark <b>Patient Ready</b> button			

  

Hygienist:	
<input type="checkbox"/> Review last entries in Progress Notes <input type="checkbox"/> RMH	<i>Before seating pt</i>
<input type="checkbox"/> Listerine pre-rinse <input type="checkbox"/> Massage chair/ BRT/ <b>give →time estimate</b> <input type="checkbox"/> Ask about CC	<i>Body language interview w/ clipboard in hand</i>
<input type="checkbox"/> B/P: <input type="checkbox"/> Intraoral & Extraoral Exam <input type="checkbox"/> Take intraoral photos of CC or if tx not scheduled last time <input type="checkbox"/> Put CC picture on pt monitor <input type="checkbox"/> Ask if you can take x-rays ( <b>Gentle!</b> ) <input type="checkbox"/> Offer eye protection <input type="checkbox"/> Update/record charting/teeth/ gums ( <b>Gentle!</b> ) <input type="checkbox"/> Update Family/Personal Notes in computer	<i>Data gathering</i>
<input type="checkbox"/> Review findings, cavities, x-rays, TP options <input type="checkbox"/> Educate using iPad, sugar bugs. <input type="checkbox"/> Educate “If Dr__ doesn’t take care of this soon it might....” <input type="checkbox"/> Offer/discuss service/products applicable/Offer FI? <input type="checkbox"/> Click <b>Hyg Ready</b> Button	<i>Pt Education</i>
<input type="checkbox"/> Prophy ( <b>Gentle! use MMW for FMD, or SCRP?</b> ) <input type="checkbox"/> Explain/record Diagnodont, small 20+ & large 30+	<i>Cleaning</i>
<input type="checkbox"/> When Dr. enters, stop (sit pt chair up if new adult pt) <input type="checkbox"/> Dr BRT 2 connections! <input type="checkbox"/> Introduce Dr & switch TV to computer (with CC pic) <input type="checkbox"/> Got Coordinator if pt has \$1k+Tx <input type="checkbox"/> Review CC and findings, Dr LISTEN w/ clipboard in hand <input type="checkbox"/> Enter treatment from Dr, prioritize, and review w/ Dr	<i>Dr Exam</i>
<input type="checkbox"/> Add to appt (FI, PA’s, ...) <input type="checkbox"/> Give patient <b>towelette</b> & goodie bag <input type="checkbox"/> Coordinator checked out pt in consult rm <input type="checkbox"/> Offered same day appt, if available <input type="checkbox"/> Mark appointment “Left Seat” <b>Exam Dr:</b> _____	<i>“Please wait while we finish paperwork”</i>

  

Exam Sheet				
Name:	NP/RC mo/yr_____			
Personal/Family Info:				
CC:				
Perio Concerns?				
FI-	Ortho	Sealants	NTI	Whitening
Diagnodont 20+		30+		
Restorative:				
Crown ( <b>DATE!</b> ):				
Ext:	RCT:	Implant/Denture		
Cosmetic:				
T   M   F   Sk   Ni				

  

Coordinator/Receptionist/Hygienist	Coordinator/Receptionist:
<input type="checkbox"/> Look for Red Flags on TP <input type="checkbox"/> <b>Verify Consent, achievable, stable TP</b> <input type="checkbox"/> <b>Financing. Offer &amp; setup.</b> <input type="checkbox"/> <b>Schedule. TP &amp; Recall.</b>  <input type="checkbox"/> Take family payment of \$ <span style="border: 1px solid black; display: inline-block; width: 100px; height: 20px; vertical-align: middle;"></span> <input type="checkbox"/> Ask if they want a txt message reminder <input type="checkbox"/> Walked patient to the exit holding door.	<i>Pt still in Office</i> <input type="checkbox"/> Finalize payment arrangements in OD <input type="checkbox"/> Look for Red Flags on claim <input type="checkbox"/> Attach x-rays, probing, narratives, NEA <input type="checkbox"/> If pt not schedule, add task to “Follow-up Call” <input type="checkbox"/> Send email asking for online review ( <i>once 6 months</i> ) <input type="checkbox"/> Grey Appointment  <i>After Pt is gone</i>