

Limited Exam Checklist

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

| Receptionist/Assistant | | | | |
|---|--|--|--|--|
| Patient Name: <i>At beginning of shift</i> <input type="checkbox"/> Set appt complete, create claim <input type="checkbox"/> Write balance below | <input type="checkbox"/> Ask if insurance changed <i>Pt at front desk</i> <input type="checkbox"/> Update phone, address, email, picture <input type="checkbox"/> Mark <i>Patient Ready</i> button | | | |

| Assistant: | Exam Sheet | | | | | | | | | | |
|--|--|-----------------|-------|-----------------|-----|-----------|----------------|--|-----|--|--|
| <input type="checkbox"/> Make sure room/floor/counter/keyboard tray clean <i>Before seating pt</i> <input type="checkbox"/> Set up Room <input type="checkbox"/> Review last entries in Progress Notes, RMH | Name: NP/RC mo/yr _____ | | | | | | | | | | |
| <input type="checkbox"/> BRT <i>Body language interview w/ clipboard in hand</i> <input type="checkbox"/> Ask about CC | Personal/Family Info: | | | | | | | | | | |
| <input type="checkbox"/> Take x-rays(Gentle!) <i>Triage Patient: 80% of time know tests & Tx to offer</i> <input type="checkbox"/> Try to convert to Comprehensive if new PT <input type="checkbox"/> Other Test (EPT, cold, etc...) <input type="checkbox"/> Take BP if not controlled or high risk. <input type="checkbox"/> Chart at least missing teeth <input type="checkbox"/> Take intra oral photos of CC <input type="checkbox"/> Put CC picture on pt monitor <input type="checkbox"/> Say "If Dr__ doesn't take care of this soon in might..." <input type="checkbox"/> At least partially fill out <i>Exam Sheet</i> <input type="checkbox"/> Update Family Personal Notes in computer | CC: | | | | | | | | | | |
| <input type="checkbox"/> Review findings, cavities, x-rays, <i>Pt Education</i> <input type="checkbox"/> Educate pt using iPad, Offer/discus service/products applicable <input type="checkbox"/> Click <i>Doctor</i> Button <input type="checkbox"/> Go over non-definitive TP and financial arrangements <input type="checkbox"/> Ask about back massage chair/ Xbox/TV/Movie | Perio Concerns? | | | | | | | | | | |
| <input type="checkbox"/> Introduce Dr & switch TV to comp (with CC pic) <i>Dr Exam</i> <input type="checkbox"/> Dr BRT 2 connections! <input type="checkbox"/> Review CC and findings, Dr LISTEN w/ clipboard in hand <input type="checkbox"/> Have Dr check Probing <input type="checkbox"/> Enter treatment from Dr, prioritize, and review w/ Dr | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 12.5%;">Fl-</td> <td style="width: 12.5%;">Ortho</td> <td style="width: 12.5%;">Sealants</td> <td style="width: 12.5%;">NTI</td> <td style="width: 12.5%;">Whitening</td> </tr> <tr> <td colspan="2">Diagnodent 20+</td> <td colspan="3">30+</td> </tr> </table> | Fl- | Ortho | Sealants | NTI | Whitening | Diagnodent 20+ | | 30+ | | |
| Fl- | Ortho | Sealants | NTI | Whitening | | | | | | | |
| Diagnodent 20+ | | 30+ | | | | | | | | | |
| <input type="checkbox"/> Try to get PT started now give →time estimate <i>Same day work</i> <input type="checkbox"/> Get Comprehensive scheduled <input type="checkbox"/> Add extra procedures to today's apt (fillings, PA, etc...) <input type="checkbox"/> Mark appointment "Left Seat" | Restorative: | | | | | | | | | | |
| <input type="checkbox"/> Take family payment of \$ | Crown (DATE!): | | | | | | | | | | |
| | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Ext:</td> <td style="width: 33%;">RCT:</td> <td style="width: 33%;">Implant/Denture</td> </tr> </table> | Ext: | RCT: | Implant/Denture | | | | | | | |
| Ext: | RCT: | Implant/Denture | | | | | | | | | |
| | Cosmetic: | | | | | | | | | | |
| | <div style="text-align: center; font-weight: bold;">T M F Sk Ni</div> | | | | | | | | | | |

| Coordinator/Receptionist/Assistant | Coordinator/Receptionist: |
|--|--|
| <input type="checkbox"/> Look for Red Flags on TP <i>Pt still in Office</i> <input type="checkbox"/> if comprehensive try to close or schedule CompEx <input type="checkbox"/> Consent, achievable, stable. <input type="checkbox"/> Financing. Offer & setup. <input type="checkbox"/> Schedule. TP & Recall. <input type="checkbox"/> Take family payment of \$ <input type="checkbox"/> Ask if they want a txt message reminder <input type="checkbox"/> Walked patient to the exit holding door. | <input type="checkbox"/> Finalize payment arrangements in OD <i>After Pt is gone</i> <input type="checkbox"/> Look for Red Flags on claim <input type="checkbox"/> Attach x-rays, probing, narratives, NEA <input type="checkbox"/> If 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 |