

RDA Training Checklist and Evaluation

Employee Name: _____ **Start Date:** _____
Location: _____

This document provides an overview of your training progress, outlining your current standing relative to the required benchmarks. It includes a performance evaluation conducted by your lead, using a standardized rating scale to assess your strengths and identify areas for improvement. A score below the minimum threshold indicates insufficient performance and will necessitate additional training to ensure successful completion of the program

Grading Scale (Per Category)

Each category will be graded on a **5-point scale per week** based on performance:

- **5 = Excellent (No supervision needed, exceeds expectations)**
- **4 = Proficient (Minimal supervision needed, meets expectations)**
- **3 = Satisfactory (Some supervision required, needs improvement)**
- **2 = Needs Improvement (Significant supervision required)**
- **1 = Unsatisfactory (Unable to perform the task, requires retraining)**

Minimum Passing Score

- To **pass**, the trainee must achieve an **average score of 4 or higher** to proceed to the next training phase.
- If any category falls below **4**, additional training and re-evaluation are required.

Categories and Checklist

1. Infection Control and Sterilization:

- Disinfect and sterilize instruments and trays per OSHA protocol
- Disinfect and break down rooms properly
- Understands cross-contamination
- Properly handle biohazard waste and sharps disposal
- Bag instruments correctly and understand dental instrument
- Know the location of materials
- Maintain equipment (changing traps, handpiece oil machine, ultrasonic, autoclave, spore test, running lines)

Score/ Lead initials: wk1 _____ wk2 _____ wk3 _____ wk4 _____

2. Thrive Experience:

- Greet patients by name
- Offer comfort items (blanket, pillow, headphones, sunglasses, Netflix, lavender towel)
- Find one personal key fact and write it in the patient's chart (the upper left corner box)
- Identify the patient's chief complaint
- Play up doctor and use names
- Inform the doctor of the patient's name, one key personal fact, and the chief complaint

- Show New Patient Welcome Video
- Have patient chart open for the doctor and x-rays
- Take detailed notes throughout the exam for the doctor
- Offer a warm lavender towel before dismissing the patient

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

3. Administrative Skills:

- Efficiently schedule and manage patient appointments
- Professionally handles incoming calls and assists as needed
- Understand scheduling (color coding and dots on schedule)
- Scan and input lab Rx information

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

4. Patient Management:

- Bring patients back in a timely manner (no more than 5-minute wait)
- Gather medical and dental histories (Inform doctor as well)
- Patient handoff at checkout (complete procedures correctly and inform the front desk of pending treatment)

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

5. Chairside Assisting:

- Understand dental terminology and tooth numbering
- Chart existing restorations and missing teeth
- Create treatment plans
- Create specialty referrals
- Use intra-oral camera to obtain quality images (no silva bubbles)
- Set up for exams (NP, recalls, limiteds, bite adjustments, post-op, pedo exams)
- Obtain quality FMX in 15 minutes (no overlapping, no cone cuts, visible apex/incisal edge, no teeth cut-offs)
- Assist hygienist with perio charting and cleaning
- Assist doctor during Class I/V fillings
- Assist doctor during Class II/III fillings
- Assist doctor during crown/bridge treatment
- Assist doctor during crown/bridge seating
- Make quality preliminary impressions for crowns/bridges
- Assist doctor during extractions
- Assist doctor during endodontics
- Assist doctor during implants
- Assist doctor in prosthetics (dentures, partials, flippers)
- Use and input appropriate template notes for doctors
- Make temporary crowns
- Explain at-home whitening tray instructions clearly and effectively
- Perform in-office Zoom whitening
- Print Rx from Open Dental

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

6. Lab:

- Make quality alginate full-arch impressions (whitening trays, NG, retainers)
- Track lab cases (Lab Case Manager)
- Pour models with minimal bubbles/voids
- Fabricate suck-down whitening trays and orthodontic retainers
- Trim and smooth whitening trays and orthodontic retainers

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

7. Specialty Procedures - Ortho:

- Basics of ortho (untie, tie back in, and clip wires)
- Deliver retainers
- Understand how to input ortho notes
- Obtain quality PANO and Ceph (proper patient positioning)
- Set up consult trays
- Set up for ortho adjustments

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

8. Evaluation by Senior Doctor(s):

- Patient interaction and chairside manner
- Rooms set up with adequate instruments and supplies (reduce the need to get up/ask for things)
- Capture high-quality diagnostic radiographs (Panoramic & Cephalometric) including clear intraoral pictures.
- Demonstrate comprehensive knowledge of all procedural steps
- Maintain a strong sense of urgency to ensure efficiency and workflow optimization

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

Senior Doctor Feedback & Recommendations:

Areas of improvement

Week 1

Week 2

Week 3

Week 4

Final Training Evaluation

- ♦ Final Decision: ☒ Pass | ☐ Fail
- ♦ Additional Training Required? YES / NO

Trainee's Signature: _____ Date: _____

Trainer's Signature: _____ Date: _____