



Training Manual  
Clinical Dental Hygienists

*The information in this manual will help ensure our practices run as smoothly as possible. They will be updated regularly and therefore should be reviewed often.*

*As new memos and information become available these manuals will be updated and distributed accordingly.*

These job descriptions have been carefully thought out and planned. Job descriptions help avoid miscommunication and frustration in the office. These manuals are viewed as guides and we expect everyone to work as a team. **If you are good enough to work at Thrive you are good enough to handle any task asked of you. Saying “it’s not my job” should never be uttered by our team members.** We pride ourselves on being a team and therefore you must be the best team player possible. We do whatever it takes to support everyone in the office to allow an outstanding patient and staff experience.

**We have very high expectations for our team members.**

Our employees have an extremely high attendance rating. Many employees have never missed a day of work and they are the ones who advance the highest at Thrive. If you have a serious emergency you **MUST COVER FOR YOURSELF**. Do not burden the managers with having to find someone to fill in for you. You should have a list of fellow employees and call every person on that list to help you during your emergency. Once all avenues are exhausted then you can contact your manager for help in coverage during your absence.

# Thrive Standards

Before anything, let's review our standards here at Thrive

1. **SERVANT LEADERSHIP.** We are servant leaders who lead with love. We always take the initiative. We care deeply and elevate the people around us.
2. **COMPASSION.** Always show compassion and empathy to patients and one another.
3. **SMILE.** Always. We always answer the phone with a smile. We greet our patients with a smile, and we always call them by their names.
4. **WELL-GROOMED.** We are in a highly professional environment with high standards. We must look the part. This means looking sharp, good hygiene, dressed professionally, and with light makeup and hair done.
5. **POSITIVITY.** Create a positive and family spirit. We are family! We choose to have a positive attitude and help our team succeed.
6. **HIGHEST STANDARDS.** We insist on only the highest standards. This includes the highest standards of dental care, customer service, professionalism, accountability, promptness.
7. **INTEGRITY.** We do everything with absolute integrity. We do not tolerate dishonesty or violation of HIPPA protocols.
8. **PROMPTNESS.** Promptness is an absolute requirement. No excuses. We want to be prepared ahead of time for our patients' arrival.
9. **TEAMWORK.** We always take the initiative to help our team succeed. If the bathroom needs to be cleaned, clean it. We never say, "that's not my job."
10. **EXPERIENCE.** We do everything in our power to deliver an awesome AWESOME experience for our patients EVERY time. Every team member asks the patient, "How was your experience?" (3 times total)
11. **ASSURANCE.** We comfort dental fears with loving care. We reassure our patients that they are in the best hands. We constantly check in with our patients, showing concern for their comfort and well-being.
12. **COMMUNITY.** We build strong and healthy communities. We serve our communities with love and generosity. Each of us represents the Thrive name. Tell everyone about us!
13. **GROWTH.** Commit to constant growth and learning. At Thrive, we empower each team member to become the servant leader they were created to be.
14. **FUN.** Have fun and dream big!

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## **A. Job Description & Daily Expectations**

Thrive hygienists are the most talented, friendliest, and most professional hygienists in the industry. The RDH role at Thrive Dental & Orthodontics is as multifaceted as it is demanding, and requires a strong, focused, quick individual that is able to multitask without compromising the quality of their work.

**We expect that each employee has a “Whatever It Takes” mentality. Your job is never a “9 to 5” job.** Every day, you must come to work “dressed for success”. Everyone is expected to do what it takes to support the success of the entire practice and have a constant awareness of daily goals. Enthusiasm is a top priority for your job. We are a busy office and everyone is expected to operate in a busy and efficient manner. High energy and a positive attitude are a must for you to be successful at your position. Although you perform your job description 90% of the time, you know other positions in the office and help out when needed. Everyone should always have a patient, friendly attitude. All patient encounters should be friendly and happy. When a patient is unhappy or dissatisfied with some aspect of our service, it is your responsibility to do what is necessary to satisfy the patient. Show the patient that you care.

- Objective – To perform dental prophylaxis, prevent or control periodontal disease and other oral conditions while focusing on patient comfort.
- You are a TEAM member not just a dental hygienist. We work together as a team to provide the best possible patient care. That includes helping answering phones with the front desk, helping with sterile, assisting doctors if needed, morning and end of day duties for the office. Saying “that’s not my job” is unacceptable
- Arrive to work a minimum of 30 minutes prior to the first scheduled patient.
- Complete all Duties on the daily checklist at appropriate times (Morning, before lunch and end of day)
- Know what is scheduled for the day. At all times, look for opportunities to work in procedures to reach goal.
- Review the schedule one day in advance. Be 100% ready for all procedures scheduled for the next day.
- Greet each patient by name and seat the patient. Introduce yourself to patients. Display a friendly and upbeat attitude. **(Use your SCRIPTS)**
- Make the patient as comfortable as possible. Talk to them. Place bib, offer headphones, TV, etc. Ensure the patient is comfortable and relaxed. **(SCRIPTS)**
- Set up trays with appropriate instruments for each procedure.
- Stay current with license, certifications for CPR, N2O, x-rays, etc.
- Stock operatories with necessary supplies and maintain inventories. Never allow a room to run out of necessary supplies.
- Sterilize instruments and trays. (See **Sterilization Protocol**)
- Efficient in adult and child prophylaxis, scaling and root planing, periodontal maintenance, gingivitis prophylaxis, x-rays, i/o images, sealants, impressions etc
- Write a complete description of any procedure you performed in the patient’s chart, with your initials and the date. (Notes **MUST** be done before leaving for the day.)
- Chart the treatment plan as the doctor calls out the recommendations, print treatment plan with appropriate insurance information written on it and announce it on the ear (See **Treatment**

### **Treatment Planning / Printing**

- Explain, as necessary, dental treatment or procedures to the patient when questions are asked. Stress the benefits to the patient. Use as much patient education as possible. (X rays, intra-oral pictures, picture books etc.)
- Take excellent impressions using correct H2O to powder ratios using snap stone. Patients should leave with their whitening trays the same day.
- Maintain the chemicals in the autoclave, and cold sterile.
- Maximize the production scheduled for the day by keeping a watch on the treatment plan to see that all possible work is completed that day.
- Keep the operatories on time so that the patients are seen on time. If running behind, notify the front desk that will in turn notify the next patient. (**Communication is the key**)
- Help out in another area of the office during down time.
- Turn on and off daily: x-ray machine(s), air compressor, lights, water, nitrous and oxygen tanks, suction system, etc.
- Set up treatment rooms.
- Oil hand pieces properly after each use.
- Empty suction traps weekly.
- Perform weekly maintenance tasks.
- Disinfect operatories after each patient.
- Use gloves, mask, and protective eyewear with every patient. Take necessary additional precautions with known infectious patients.
- Maintain and clean sterilization lab. ( Lab **MUST** be cleaned at the end of day )
- Combine efficiency, productivity, and caring for patients in all actions.
- Give post-op instructions at the end of each appt, applying fl2 varnish (nothing too hard or hot to eat for few hours and no brushing for 4 hours) SRP post op instructions form is readily available and should be given to pt after srp
- Order inventory and supplies. **We do not run out of supplies and/or materials.** Saying “its on backorder” is unacceptable. You will be written up if you run out of supplies/materials. Our dental representatives/Regional RDA will get a material for us at another local dental office if needed.
- Put supplies away as they are delivered each day. They are checked in according to the invoice and put away in a very orderly way.
- Attend continuing education.
- Stay current on expanded duties.
- **Encourage patient referrals.** “Gosh, Mr. Coughlin, you are so friendly and easy to work with! If you have any friends or family members like you, please send them our way.”
- Cross train in other areas of the office.
- Maintain a spotless work environment throughout the day. No overflowing trash cans, paper or trash on the floor, etc.
- Maintain all dental equipment. Call appropriate company for repairs or questions. (See **Equipment Repair / Replacement Guidelines**)
- **Talk** to patients during their procedures to help them feel comfortable. It is your responsibility to make the patient feel at ease.
- Learn how to do everything the Thrive way. This includes seating patients properly, dismissing patients properly, using **excellent verbal skills**, etc. We expect a lot out of our clinical assistants. We especially require **efficiency** in all areas of your work.

We believe in investing a little more on the front end of any given task to get it “perfect” as opposed to doing the task sloppily and having to invest ten times more time later on to clean it up.

**Examples:**

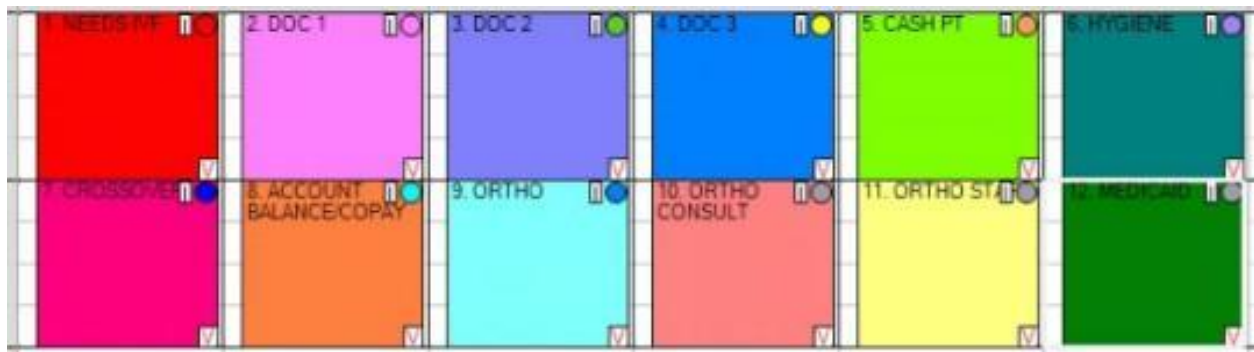
- Data entry, including patient notes must be filled out completely and accurately.
- Our hygienist will perform all procedures the best they can possibly be done the first time. Redo's are inefficient, unproductive, costly, etc.
- Hygienists will learn the proper ways of taking impressions for whitening trays. Having the patient return to the office for retakes is extremely poor customer service.
- We want every task that we perform to be excellent, efficient, and reflect high expertise and skill. We want to handle patients, coworkers, insurance companies, etc. in a way that reflects the pride we take in our work.

**B. Infection Control**

- Review full medical history on each patient
- Treat all patients as if they were infectious
- Be vaccinated against Hepatitis B
- Use an antiseptic hand wash
- Wear a disposable mask or face shield
- Wear disposable gloves any time you touch mucous membranes
- Wear protective eyewear
- Wear a disposable gown or lab coat when splatter is expected
- Wear clinical attire at all times
- Put needles and other sharps in a puncture resistant container
- Use sterilized hand pieces
- Use an ultrasonic cleaner instead of hand scrubbing instruments
- Package instruments correctly for sterilization
- Monitor the sterilizer with appropriate spore tests weekly
- Use glutaraldehyde for items that cannot be heat sterilized for the appropriate time recommended
- Use an appropriate surface pre-cleaner
- Use an appropriate surface disinfectant for the time recommended by the manufacturer
- Use surface covers
- Have an adequate waste disposal system according to local regulations

## C. Confirmation status / Blockouts

Every office has the same confirmation colors so it is important to familiarize yourself with them.



### Color of the Confirmation Button

1. Unconfirmed/Not Called
2. Lighthouse Confirmed
3. Office Confirmed
4. Left Voicemail
5. Arrived
6. Ready to be seated
7. In Room
8. Treatment Plan Ready
9. Texted
10. Appt Completed

### Color of the Appointment

1. Needs Insurance to be verified
2. Doctor #1
3. Doctor #2
4. Doctor #4
5. No insurance/cash patient
6. Hygiene patient
7. Cross over patient
8. Patient has a balance due
9. Ortho Patient
10. Ortho Consult
11. Ortho Start
12. Medicaid Patient

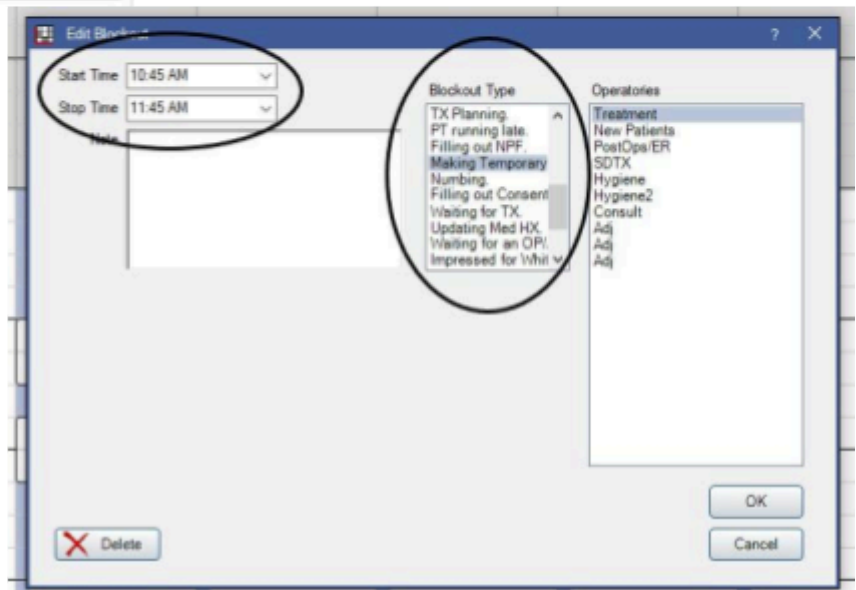
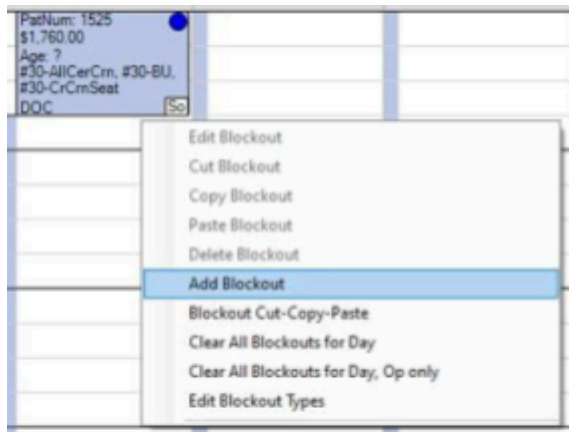


## Adding blockouts to schedule

We want to add a blockout to the schedule to show what is going on in the operatory. This will help with training and to see how long we're taking in rooms for cleanings, srp's, exams etc. In addition to this we want to **attach the RDH's name to the appointment**. This is so we know where everyone is at and to hold the RDH accountable if notes are done.

### Blockouts:

- Right click under or over patients name
- Click **Add Blockout**
- Adjust times and choose the Blockout Type ( running late , waiting on DR, Waiting on RDH, Etc. )



## Attaching RDH's name to appointment

- Double click on patient's appointment
- Go to assistant drop down box
- Click on your name

**Edit Appointment - Sonya Bilano on Friday, 03/04/2022 10:00:00 AM | OP-1**

**Patient Info**

First Name: Sonya  
Last Name: Bilano  
Middle Initial: [blank]  
Birthdate: 01/01/0001  
Home Phone: [blank]  
Work Phone: [blank]  
Wireless Phone: [blank]  
Billing Type: Standard Account  
Total Balance: 0.00  
Address and Phone: [blank]  
Notes: [blank]  
Family Balance: 0.00  
Est. Patient Portion: 1760.00  
Fee This Appt: 1760.00

**Appt Fields**

Status: Scheduled  
Unscheduled Status: none  
Confirmed: In Treatment Room  
New Patient: [checkbox]  
Provider: DOC  
Hygienist: None  
Assistant: Sonya (highlighted)  
Color: [blank]  
Appointment Type: [blank]  
Time Ask To Arrive: [blank]  
Time Arrived: [blank]  
Time Seated: [blank]  
Time Dismissed: [blank]  
Lab: [checkbox]  
Ins Plan 1: [blank]  
Ins Plan 2: [blank]  
Appointment Note: [blank]

**Procedures on this Appointment**

Stat	Priority	Tth	Surf	Code	Description	Fee
TP				D0120	(other appt) periodic oral evaluation - established patient	39.00
TP				D0220	(other appt) intraoral - periapical first radiographic image	20.00
TP				D0230	(other appt) intraoral - periapical each additional radiographic image	18.00
TP				D0274	(other appt) bite wings - four radiographic images	100.00
TP				D1110	(other appt) prophylaxis - adult	100.00
TP				D1208	(other appt) topical application of fluoride - excluding varnish	74.00
TP				N4101	Post Op	0.00
TP				N4101	Post Op	0.00
TP	30			D2740	crown - porcelain/ceramic	1395.00
TP	30			D2950	core buildup, including any pins when required	365.00
TP	30			N4119	All Cer Crm Seat	0.00

**Communications Log - Appointment Scheduling**

DateTime: [blank] Description: [blank]

Buttons: Delete, Add, Attach All, Show Automated Commlgts, Comm, Text, Audit Trail, To Task List, Delete, OK, Cancel

## Examples :

Waiting For Dr.

PatNum: 1525  
\$177.00  
Age: ?  
PerEx, PA, PA+, 4BW So  
TX Planning.

PatNum: 1525  
\$174.00  
Age: ?  
Pro, Flo

PatNum: 1525  
\$1,760.00  
Age: ?  
#30-AllCerCrm, #30-BU,  
#30-CrCrmSeat  
DOC So  
Making Temporary.

## **D. Procedures / Set-up:**

### **How to Place Topical Correctly**

1. Always double check the appointment to verify what treatment we are doing.
2. Dry the area where the needle will enter the tissue with gauze. The area must be very dry. No saliva or it will not work.
3. Maintain the dryness and place a small drop on a cotton tipped applicator and apply to the localized area.
4. Use suction in the mouth to keep saliva from coming into contact and diluting the topical.
5. Let the patient know the numbing gel will sit for about 1 minute.
6. Keep completely dry and then let a doctor know the patient is ready to numb.
  - a. If the patient is waiting too long for the doctor, inform the patient that you will be removing the numbing gel and will reapply once the doctor is getting closer to coming in the operatory.

**If a patient is staying for treatment ALWAYS place topical first THEN set up the room while we're waiting for the patient to get numb.**

### **New Patients**

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over **scripts**, There should **NEVER** be silence when walking a patient back to their room.
3. Review Medical History, Ask patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
4. Take Blood Pressure and record in the patients clinical notes
5. Make sure the appointment is split. Exam, X-rays should be separate from the Cleaning (see **Splitting Appointments**)
6. Ask the patient why they are here—are they having any pain?
7. When was the last time they saw a dentist?
8. Does the patient have any cosmetic or orthodontic interest?
9. Take appropriate x-rays.
10. Take whitening impressions. Place in the lab with the name to start being made by lab tech or yourself.
11. Announce that the patient is ready and any main concern.
12. The patients chart & x-rays should be on the screen and visible prior to the doctor entering the operatory.  
**At this time you will give the patient Thrive sunglasses.**
13. Once the Doctor enters the operatory, make sure the provider is correct and mark the appointment as complete. (It is very important that each appointment / notes are set complete with the correct provider)
14. Introduce the patient to the Doctor & Inform the doctor with the information the patient has given you
15. Treatment plan & phase what the doctor recommends. **Tx plan should be complete by the time the doctor leaves operatory.**
16. Create a claim for the Exam and Xrays.
  - a. This is vital or else the ENTIRE TREATMENT PLAN WILL BE INCORRECT.
17. Review Insurance & Print treatment plan (**See Treatment Planning / Printing**)
18. Write appropriate information on top of the paper and present to Treatment Coordinator

**\*\*Check on the patient every 5 mins if waiting on a doctor or tx coordinator. Offer water, pillow, blanket, and headphones.**

## Limited Exam

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over scripts
3. Review Medical History, Ask patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
4. Seat patient and take Blood Pressure and record in the patients clinical notes
5. Ask the patient their chief concern, the last time they saw a dentist.
6. Ask patient to point to what hurts.
7. Look in mouth for problem (visible decay, broken tooth, class V abrasion, etc.).
8. Take a PA and BW, or more if needed. Double shield if patient is pregnant and take only one x-ray. **Make sure they have OBGYN release form.**
9. Enter detailed notes about events. Document what is wrong, TA or just sensitivity, when did it happen, etc.
10. **Always** have patients chart & x-rays open on the screen and visible prior to the doctor entering the operatory. **Give the patient Thrive sunglasses.**
11. Once the Doctor enters the operatory, complete the appt with the right provider immediately. (It is very important that each appointment / notes are set complete with the correct provider)
12. Introduce the patient to the Doctor & Inform the doctor with the information the patient has given you
13. Treatment plan & phase what the doctor recommends
14. Create a claim for the Exam and Xrays.
  - a. This is vital or else the ENTIRE TREATMENT PLAN WILL BE INCORRECT.
15. Review Insurance & Print treatment plan (**See Treatment Planning / Printing**)
16. Write appropriate information on top of the paper and present to Treatment Coordinator.

## Periodic Exam with Prophylaxis

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over scripts, There should NEVER be silence when walking a patient back to their room.
3. When the patient is seated, split their appointment. Exam & X-rays should be separate from the Cleaning (see **Splitting Appointments**)
4. Review Medical History. Ask the patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
5. Take Blood Pressure and record in the patients clinical notes
6. Ask the patient if they have any chief complaints- if so note it in the chart and take necessary additional xrays to address chief complaint
7. Take appropriate x-rays. (if chief complaint take BW and PA of the area)
8. Take a series of Intra-oral photos of each quadrant. Make sure to dry the occlusal surfaces well to capture proper photos. These photos will be used by the RDH/Doctor to show the patient during the exam
9. Once pt is comfortable, BP, xrays and photos are complete. Let the patient know Dr. (mention doctors name) will be coming in shortly to do their exam. If they haven't met this doctor explain to the patient at Thrive we work with a wonderful team of doctors and they're going to love Dr. Christine(mention docs name)
10. Announce that the patient is ready (and any main concerns)
11. The patient's chart & x-rays should be on the screen and visible prior to the doctor entering the operatory. **Give the patient Thrive sunglasses.**
12. Once the Doctor enters the operatory, change the provider immediately. (It is very important that each appointment / notes are set complete with the correct provider)
13. Introduce the patient to the Doctor & Inform the doctor with the information the patient has given you
14. Treatment plan & phase what the doctor recommends
15. Create a claim for the Exam and Xrays.
  - a. This is vital or else the ENTIRE TREATMENT PLAN WILL BE INCORRECT.

16. Review Insurance & Print treatment plan (**See Treatment Planning / Printing**)
17. Write appropriate information on top of the paper and present to Treatment Coordinator
18. Complete prophylaxis based off patient comfort, (adjust settings as needed to ensure patient is comfortable) cavitrator, hand scale, polish, floss, fluoride if pt consented (review cost of f12 to patient and make sure to use code 1206 for f12 varnish) probe, OHI
19. At the end of the appt offer patient a warm lavender towel and if they have any questions gladly answer them
20. Schedule patients next recall appt and hand them a toothbrush bag to take home
21. Ask the patient for a review by handing them our QR codes to scan. Remind them they get an extra whitening syringe for a review
22. Communicate with the front on the walkie if patient can be walked up
23. Walk patient up Introduce patient to front desk by name *"Emily this is John from Op 4, he had his cleaning today with fluoride, he has pending treatment that needs to be scheduled asap. I went ahead and made his 6mr recall appt."* Turn to the patient, thank them (by name) for coming in and you'll see them in 6 months for their cleaning.

### Prophy Setup



**Hygiene Kit includes: Mirror, explorer/probe, 4 hygiene scalers. Complete the setup with a Cavitron tip, prophylaxis angle, prophylaxis paste, gauze, floss, and if necessary fluoride.**

## Periodontal Maintenance

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over scripts, There should NEVER be silence when walking a patient back to their room.
3. Review Medical History. Ask the patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
4. Take Blood Pressure and record in the patients clinical notes
5. Make sure patient is comfortable by offering them blanket, pillow, netflix, headphones, Thrive sunglasses, water etc
6. Begin perio maintenance cleaning, Cavitron(adjust settings of cavitron to ensure patient comfort), handscale, polish, floss. If necessary irrigate gingival tissue with chlorhexidine
7. Be sure to update probe depths and explain to the patient if there any improvements or if any areas increased in bone loss
8. If necessary take and show patient intra-oral photos
9. At the end of the appt offer patient a warm lavender towel and if they have any questions gladly answer them
10. Schedule patients next perio maintenance appt and hand them a toothbrush bag to take home
11. Ask the patient for a review by handing them our QR codes to scan. Remind them they get an extra whitening syringe for a review
12. Communicate with the front on the walkie if patient can be walked up
13. Walk patient up Introduce patient to front desk by name *"Emily this is John from Op 4, he had his perio maintenance cleaning today with fluoride, he has pending treatment that needs to be scheduled asap. I went ahead and made his 3mr recall appt."* Turn to the patient, thank them (by name)for coming in and you'll see them in 3 months for their cleaning.



## Perio Maintenance Setup



**Hygiene Kit includes: Mirror, explorer/probe, 4 hygiene scalers. Complete the setup with a Cavitron tip, prophylaxis angle, prophylaxis paste, floss, fluoride and chlorhexidine/listerine irrigation if necessary.**

## Scaling and Root Planing (SRP)

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over scripts, There should NEVER be silence when walking a patient back to their room.
3. Review Medical History. Ask the patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
4. Take Blood Pressure and record in the patients clinical notes
5. Make sure patient is comfortable by offering them blanket, pillow, netflix, headphones, Thrive sunglasses, water etc
6. Ask patient if they would prefer topical numbing gel (BLT) or local anesthesia
7. If pt chooses **BLT**: (benzocaine, lidocaine, tetracaine gel)
  - Dry gingiva really well with air/water syringe and gauze
  - Using a cotton tip applicator, apply a **small** amount of BLT on necessary area
  - Place suction in mouth to remove an excess saliva and or BLT gel
  - Explain to pt that BLT gel is a combo gel and is very strong “a little bit of this gel goes a long way”
  - Instruct pt to not swallow BLT gel (explaining to pt if swallowed, pt will be okay it will just feel as if throat is slightly numb)
8. If pt chooses **Local anesthesia** (administered by doctor)
  - Apply BLT Gel (see rules for BLT above)
  - Communicate with Doctor that patient is ready for anesthesia for (UR,LR etc) quads of SRP
  - Have syringe, carpules of anesthetic ready
  - Once Doctor administers local anesthesia, give patient a few minutes to feel numb
9. Begin SRP using cavitron (Always adjust power/water settings of cavitron to patient comfort)
10. Handscale- scale and root planing until all plaque/ calculus is completely removed
11. Make sure probe depths are entered in perio chart (communicate with team if you need help charting)
12. If necessary irrigate gingival tissue with chlorhexidine
13. Take post op x-rays and show patient calc removal
14. Take intraoral photos after srp is done to show patient calculus removal
15. If necessary apply fluoride and give instructions
16. If chlorhexidine was prescribed (which we carry in our office) explain instructions: use rinse for 30 seconds every night for 2 weeks, no more than 2 weeks because it may cause staining on the teeth. Chlorhexidine will help with reducing bacteria in the mouth and reduce bleeding and inflammation. The rinse has a 2 year shelf life so advise patient to keep it in medicine cabinet for future use.
17. Rev oral hygiene instructions with patient
18. Schedule Patient for their 3 month perio maintenance visit
19. Explained to the patient the importance of maintaining their appointments to maintain their periodontal health and prevent the bone loss from progressing.
20. Explain to pt numbness will wear off in 30min-1 hr(if BLT) or few hours (if local anesthesia) and to wait to eat or stick to eating something soft to prevent patient biting their lip/cheek/tongue.
21. Give a patient a post op bag : toothbrush, toothpaste, floss, chlorhexidine rinse (if prescribed) and SRP post op instructions form
22. Ask the patient for a review by handing them our QR codes to scan. Remind them they get an extra whitening syringe for a review
23. Communicate with the front on the walkie if patient can be walked up
24. Walk patient up Introduce patient to front desk by name *“Emily this is John from Op 4, he had his SRP cleaning today with fluoride, he has pending treatment that needs to be scheduled asap. I went ahead and made his 3mr recall appt.”* Turn to patient, thank them (by name)for coming in and you’ll see them in 3 months for their cleaning.



### SRP Setup



**Hygiene Kit includes: Mirror, explorer/probe, 4 scalers. Complete the setup with a Cavitron tip, gauze, BLT gel, cotton tip applicator, floss, fluoride and chlorhexidine/listerine irrigation if necessary.**

### **DEEP CLEANING POST OP INSTRUCTIONS**

Scaling and root planing is a non-surgical treatment of periodontal disease. The purpose of the treatment is to remove bacterial plaque and tartar from around teeth and under the gum line, which is causing bone loss. The goal is to produce clean, healthy teeth and roots, which will promote healing of the inflammation and infection that causes gum disease.

You may take an over-the-counter pain reliever for any tenderness or discomfort. Take ibuprofen (Advil/Motrin) or acetaminophen (Tylenol) unless you have medical conditions or allergies.

After scaling and root planing, avoid eating anything on the area being treated for two hours or until the anesthetic has worn off completely. It is easy to bite or burn your cheek, tongue or lip while numb. Avoid any hard foods such as tortilla chips, potato chips, popcorn, or seeds for the next several days.

To help soothe the area, rinse your mouth 2-3 times a day with warm salt water rinses. If you are prescribed Peridex/Chlorhexidine, use as directed. (**Do not use** Chlorhexidine rinse for more than 2 weeks to avoid staining)

Resume your home care regimen of brushing twice a day with a soft bristled toothbrush and daily flossing immediately, but be gentle with the area recently treated. Your gum health must be maintained with proper home care, as instructed, and regular dental visits. You may use a WaterPik if recommended.

It is not unusual for the teeth to be more sensitive to hot or cold temperatures, and/or sweets. This is normal. This occurs as the gum tissue heals and shrinks in size and should gradually resolve in a few weeks with proper home care. Consistently brushing two to three times daily with sensitivity toothpaste or using fluoride rinses may alleviate this over time. Avoid toothpastes with "whitening" or baking soda, as this will contribute to the problem. If sensitivity continues or is severe, professional application of a desensitizing agent may be required.

Refrain from smoking for 24 to 48 hours after scaling and root planing as tobacco will delay healing of the tissues. Smoking cessation is highly recommended.

You can expect to notice less redness, less bleeding, and less swelling of your gum tissues.

We will look forward to seeing you for your regular periodontal maintenance to keep up with what we just accomplished together!

## Sealants

1. Greet the patient. ALWAYS by name with a SMILE. Introduce yourself.
2. Go over scripts, There should NEVER be silence when walking a patient back to their room.
3. Review Medical History. Ask the patient if they are allergic to anything or expecting / pregnant (Regardless of what is noted on Medical History) make any changes if needed.
4. Take Blood Pressure and record in the patients clinical notes
5. Make sure patient is comfortable by offering them blanket, pillow, netflix, headphones, Thrive sunglasses, water etc
6. Clean And Dry The Teeth.
7. Use dry angles, cotton rolls as needed.
8. Apply Etch Solution.
9. Rinse And Dry The Teeth.
10. Paint The Sealant Over The Enamel.
11. Harden The Dental Sealant With A Curing Light.
12. Offer patient warm lavender towel
13. Communicate with the front on the walkie if patient can be walked up
14. Walk patient up Introduce patient to front desk by name *"Emily this is John from Op 4, he had his sealants he has pending treatment that needs to be scheduled asap. I went ahead and made his 6mr recall appt."*  
Turn to patient, thank them (by name)for coming in and you'll see them in 6months for their cleaning.

## Time Management:

### 1. Periodic exam with prophy-

- Appointments are scheduled for 1 hour
- BP, Xrays, II/O photos, Exam, Treatment planning should not take more than 30 min to complete
- With all the above completed within a timely manner, this leaves 30 min (or more) for regular prophy to be completed

### 2. Scaling and Root Planing (SRP)-

- We understand SRP are based on a case-by-case basis however, if the patient is staying same day for SRP procedure, complete the appointment within an hour. If Srp is not fully completed, bring the patient back for a complimentary fine scale and schedule time accordingly.
- Take the post op x rays to help guide you to see if it is necessary or not to bring the patient back.

### 3. Perio Maintenance-

- **Perio maintenance with Periodic exam-** Appointments are scheduled for 1 hour
- BP, Xrays, II/O photos, Exam, and Treatment planning should not take more than 30 min to complete, this leaves 30 min (or more) for perio maintenance to be completed
- **Perio maintenance without exam-** appointments are usually scheduled for 30min to an hour

## E. Splitting Appointments:

PatNum: 5904 \$131.00 Age: ? PerEx, #-PA, 4BW	PatNum: 5904 \$311.00 Age: ? PerEx, #-PA, #-PA+, 4BW.
PatNum: 5904 \$159.00 Age: ? Pro, Flo	Pro, Flo Dr. Kang \$311.00 Cell: (214)801-5657
<b>Split Appt.</b>	<b>Appt prior to being split</b>

To split appointments delete the cleaning from the original appointment and shrink the appointment to 30min.

Stat	Priority	Tth	Surf	Code	Description	Fee
TP				D0120	periodic oral evaluation - established patient	50.00
TP				D0220	intraoral - periapical first radiographic image	25.00
TP				D0274	bitewings - four radiographic images	56.00
TP				D1110	prophylaxis - adult	100.00
TP				D1208	topical application of fluoride - excluding varnish	59.00

- Create a second appointment with the cleaning separate by:

- Clicking "Make Appt." at the top of the appt toolbar.
- New appointment on the bottom or Click on create appt.

The screenshot shows the 'Open Dental' software interface. The 'Make Appt.' button is circled in red in the top toolbar. Below, the 'Appointments for Patient' window shows a list of appointments. The 'Create New Appt.' button at the bottom right is also circled in red.

3. You will click on the treatment you are making the second appt for. Click OK.
4. Once the appointment is created you can pin board it (the appointment will be placed on the side of the schedule) and drag it back onto the schedule as a second appointment

Edit Appointment - MARISSA TEST on Monday, 01/01/0001 12:00:00 AM

1 2

0:30

**Patient Info**

First Name: MARISSA  
Last Name: TEST  
Middle Initial:   
Birthdate: 01/01/0001  
Home Phone:   
Work Phone:   
Wireless Phone: (214)801-5657  
Credit Type:   
Billing Type: Standard Account  
Total Balance: 0.00  
Address and Phone:   
Notes:   
Family Balance: 0.00  
Est. Patient Portion: 159.00  
Fee This Appt: 159.00

**Appt Fields**

Time Ask To Arrive:   
Time Arrived:   
Time Seated:   
Time Dismissed:   
Lab:   
InsPlan 1:   
InsPlan 2:   
Appointment Note:

Status: UnshedList  
ASAP: ☐  
Unshed Status: none  
Confirmed: ☐  
New Patient: ☐  
Provider: NC  
Hygienist: None  
Is Hygiene: ☐ (use hyg color)  
Assistant: none  
Time Locked: ☒  
Color: none  
Appointment Type: None  
Time Ask To Arrive:   
Time Arrived:   
Time Seated:   
Time Dismissed:   
Lab:   
InsPlan 1:   
InsPlan 2:   
Appointment Note:

Single click on items in the list below to add them to this appointment.

NP Comprehensive Exam  
\$49 Special (Comp ex)  
Under 12 NP  
Under 6 NP  
NP Exam Under 3  
Existing Pt Full Exam  
BVM & Pals  
18 Months OVERDUE Ex  
Limited Exam & X-rays  
\$39 Special (Emergency)  
Post-Op/Office Visit  
SRP Post-Op/Probing  
Per Ex w/ pt (Adult)  
Per Ex w/px #2 (Child)  
Perio Mnt Recall w/ ex & :  
PerioMant ONLY  
Filling Adjustment  
NP Ortho Consultation  
ORTHO Start (D8090)  
ORTHO Start PHASE I  
Ortho Adjustment  
Ortho Invis trays  
Ortho ER  
Ortho DEBOND  
Ortho Deliver Retainer(s)  
Ortho Retainer Check  
Ortho Impress Retainer(s)

Delete + Add Attach All

**Procedures on this Appointment**

Stat	Priority	Tth	Surf	Code	Description	Fee
TP				D0120	(other appt) periodic oral evaluation - established patient	50.00
TP				D0220	(other appt) <del>periapical</del> - periapical first radiographic image	25.00
TP				D0274	(other appt) blewings - four radiographic images	55.00
TP				D1110	prophylaxis - adult	100.00
TP				D1208	topical application of fluoride - excluding varnish	59.00

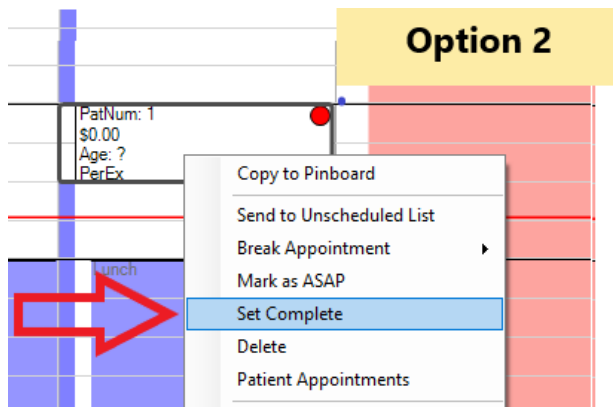
Show Automated Comlogs

**Communications Log - Appointment Scheduling**

Date/Time	Description
01/22/2019	Appt BROKEN for 01/22/2019 7:00:00 PM
01/22/2019	Appt BROKEN for PerEx, 4B/W, Pro, Flo 01/22/2019 7:00:00 PM
02/07/2019	Appt BROKEN for PerEx, 4B/W, Pro, Flo 02/07/2019 7:00:00 PM pt was sick rescheduled appt
12/07/2021	Called patient for crown on tooth #19 and scheduled for 12/10/21.NC
12/07/2021	Deleted Appointment & saved note: #19-St Crown. "UPDATE MEDICAL HISTORY"

Comm  
Text  
Audit Trail  
To Task List  
Delete  
OK  
Cancel

## F. Setting Appointments Complete and making a claim:



The patient must have their appointment set complete prior to getting escorted to checkout. Verify what is being set complete to the ledger is accurate.

## Making a claim:



Log Off File Setup Lists Reports Tools eServices Alerts Help

Select Patient Add Comment **New Claim** Print Mail Text Letter Forms Tasks ECL Label Popups

Payment 0.00 65 61.95 over 90  
 Aging 118.00 0.00 0.00 0.00

Patient Account Auto Ortho

Date Patient Prg Code Yrb  
 01/10/2022 Test DOC D0150 complete  
 01/10/2022 Test Office D0210 intraoral  
 01/10/2022 Test Office D0210 intraoral

Claim Status: Inviting to Send  
 Claim Type: Primary  
 Date of Service: 01/10/2022  
 Date Orig Sent: 01/10/2022  
 Date Sent: 01/10/2022  
 Date Received:   
 Resend

Med/Dept: Dental  
 Claimform: ADA 2012  
 Billing Provider: NC  
 Treating Provider: NC  
 Insurance Benefits:   
 Resend

Insurance Plan: Delta Dental of PA (Test Test)  
 Relationship: Self  
 Other Coverage:   
 Change None

Enter Payment:  
 By Total  
 By Procedure  
 Supplemental  
 Split Claim

#	Date	Prg	Code	Yrb	Description	Fee	Billed to Ins	Deduct	Ins Est	Ins Pay	Unpaid	Status	Post	Pay Tracking	Remarks
1	01/10/2022	DOC	D0150		comprehensive oral evaluation - new or established patient	45.00	45.00	0.00	45.00	0.00	0.00				
2	01/10/2022	Office	D0210		intraoral - complete series of radiographic images	79.00	120.00	0.00	79.00	0.00	0.00				

Totals: 169.00 0.00 118.00 0.00 0.00  
 Recalculate Estimates

Insurance Payments  
 Amount Check Num Bank/Branch Note  
 + Add Payment  
 + Batch  
 + This Claim Only

Reasons unpaid: (show on patient bill)

Medical Status History  
 Is For Ortho  
 Date of Placement  
 Months Total  
 Months Remaining

Claim Referral  
 Only enter referring provider and referral number if required by your insurance carrier  
 Referring Provider: None Select Edit

Claim Note: (does not cancel payment edits)  
 Unless this claim is paid or settled within 30 days we will file a complaint with the dental insurance commissioner. Please pay accordingly!

OK Cancel

# To create a claim:

1. In the "Account" module highlight the procedures.
2. Click "New Claim"
3. Make sure "Billing Provider" and "Treating Provider" are correct.
4. Right click in the "Claim Note" and add the insurance quick note.
5. Push "OK"

## **G. Pregnant / Nursing Patients:**

### **Pregnant Patients**

The 2nd trimester is the safest time to treat pregnant patients. However, it is our philosophy to only treat acute problems and or conditions that are likely to worsen significantly before the baby is born. We do not do routine care on pregnant patients except for cleanings. We do not take FMX's or multiple BW's, Pano, etc. We only take a PA and BWX of the area of concern, using a lead apron. Delay the majority of the x-rays until after the pregnancy. If there is a problem that must be treated, a **medical consent** must be obtained from her OB first. We also need treating physicians clearance before administering local anesthetic. It is rare but there are times when the physician does not want the patient to receive any epinephrine.

Pregnant and nursing mothers should not bleach. Whitening chemicals can transfer to the baby through the mother the same as medications. It is always better to be safe than sorry. The patient can come back after the baby is born for their whitening tray impressions. Make sure to document in the clinical note that impressions were not taken and the Promo should not get set complete to the ledger.

### **Nursing Patients**

- If possible, consult with a pediatrician.
- If pediatrician is not available, then take the following steps:
- Switch baby to formula while taking antibiotics if needed.
- If unable to give baby formula, take antibiotics and feed the baby immediately (within 1 hour). This allows the baby to finish feeding before antibiotics have gotten into the mother's system.
- Repeat this every 6-8 hours.
  - Medications to take that are safe during pregnancy and nursing
    - Tylenol #3
    - Norco
    - Amoxicillin/Clindamycin
    - Acetaminophen



## **H. Alginate Impressions:**

Alginate impressions are used for bleach trays, night guards, partials, dentures and orthodontic retainers. For you to take an impression, you must know how to use the correct water to powder ratio for the alginate and stone. You must also know the correct way to pour up a model. All impressions **must** be perfect and an excellent job **must** be done. Review your impressions just as if you were reviewing it to send to the lab. When you have a questionable impression then you will probably need to re take it. Or ask your lead if the impression will work.

All impressions are to be poured up immediately. Placed in a bin in the lab with the patient's name and what the impressions are for. If it's for whitening trays we will make them right away. We want to have the whitening trays delivered by the end of the visit. If not possible the same day, try to get to them the next day.

### **Impression Pouring and Trimming Technique**

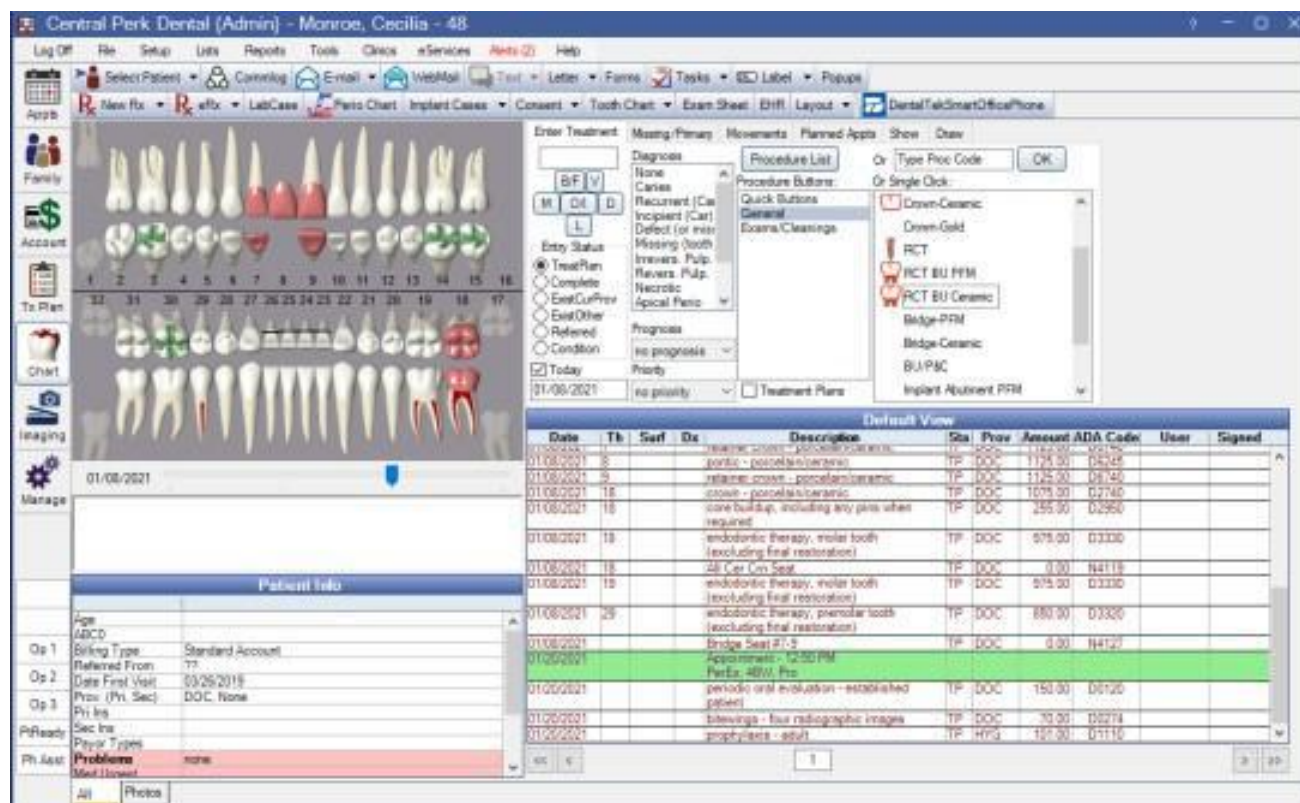
Wash clean of debris, spray and dry all impressions (in the operatory).

- Use appropriate powder to water ratio of snap stone.
- Use vibrator to pour stone into models.
- Clean your bowls when you are finished. **DO NOT** leave them in the sink dirty.
- Fast stone takes about 10 mins to set.
- Carve off any bubbles, pop any little clumps of stone off the occlusal surfaces so the teeth can articulate properly.
- Suck down with whitening / retainer material.
- Cut out when cooled down or run under cold water to set it faster.
- Cut whitening trays/trim retainers and place in the thrive case.
- Place trays in a goodie bag with the appropriate instructions.

**\*Remember to inform your patient about doing REVIEWS to receive an extra gel syringe.\***

## I. The Patient Chart: Charting & Treatment Planning Steps

### Patient Chart Buttons:



## Chart Toolbar



**New Rx:** Click New Rx to create single Rx / Prescription. Click the dropdown, then Rx Manage to create and print multiple prescriptions at once.

**Rx:** Create an prescription. Print under correct provider and have Doctor sign.

**LabCase:** Create new Lab Cases.

**Perio Chart:** Enter periodontal information in the Perio Chart.

**Ortho Chart:** Open the Ortho Chart, an alternate method of keeping track of visits. Info entered here does not show in regular patient chart. Click the drop down to open a specific tab when multiple tabs are set up.

**Tooth Chart:** Click the drop down to view a full screen of the tooth chart, or save it as an image.

## Tabs



To minimize/maximize the tab areas, click the currently selected tab.

**Enter Treatment:** Enter and chart procedures. Enter Treatment

**Missing/Primary:** Record missing teeth, and mark primary/permanent teeth on the graphical tooth chart. Missing/ Primary Teeth

**Movements:** Indicate tooth movement on the graphical tooth chart. Tooth Movements

**Planned Appts:** If treatment is needed, set up the patient's next appointment. Planned Appointments

**Show:** Set up different views for the Progress Notes grid. Show Chart Views

**Draw:** Freehand draw on the graphical tooth chart. Draw on Tooth Chart

#### **Treatment Plan Steps:**

1. Complete the patients Exam & X-rays (using the confirmation status box on the right hand side of the appointment book toolbar change status to tx plan ready).
2. Make a claim for the exam and radiographs and click "Update Fees" in the treatment plan module.
3. Phase treatment plan in order accordingly:
  - a. **Patient's chief complaint should be first per Doctor/Patient request**
  - b. SRP
  - c. Fillings
  - d. Root Canal / Crown / Build-up
  - e. Bridge
  - f. Implants
  - g. Extractions ( Include Pano,Nitrous & Non IV Sedation. )
  - h. Removable
  - i. Veneers
4. Review patients insurance plan for the following information:
  - a. Patient History ( on existing treatment: Crowns & SRP's)
  - b. SRP (Frequency / How many quads can be done that day )
  - c. Waiting Period (Applies to Basic / Major)
    - i. If there is a waiting period that applies, any procedure that affects this you **MUST** zero out the insurance coverage so that it does not apply to the treatment plan.
  - d. Missing Tooth Clause
    - i. If there is a MTC (Missing Tooth Clause) that applies you **MUST** zero out the insurance coverage so that it does not apply to the treatment plan.
      1. This applies to any bridges, partials, implants etc. where the patient has teeth that **were missing prior** to the diagnosed treatment or insurance coverage.
  - e. Implants
    - i. You must check the patient's insurance plan to determine if they have implant coverage and/ or if a Waiting Period / Missing tooth clause applies. If so you must zero out the implant so that insurance coverage does not apply to the treatment plan.
  - f. Veneers / Cosmetic Treatment
    - i. You must zero out all veneers so that insurance coverage does not apply to the treatment plan. **\*\*Wax-up fees are additional**
    - ii. Always make sure that you confirm with the Doctor if any treatment diagnosed on any anterior teeth is clinically needed or cosmetic so that you know if the procedure needs to be zeroed out or not.



6. Update all fees / any changes made by clicking **UPDATE FEES** sign in the upper left corner on the top toolbar and print your treatment plan.
7. After printing the treatment plan write the following information on the top:
  - a. Op # that the patient is in
  - b. Any Waiting periods
  - c. Any Missing Tooth Clause
  - d. SRP frequency

12/04/2021

Proc	Priority	Tb	Surf	Code	Sub	Description	Fee	Allowed	Pt Ins	Sec Ins	Pmt
L	1	14	MO	D2362	A	resin-based composite - two surfaces, posterior	170.00	105.90	44.00	0.00	128.00
						Pt Deduct Applied: \$50.00					
						resin-based composite - two surfaces, posterior	170.00	105.90	84.00	0.00	86.00
						<b>Subtotal</b>	<b>340.00</b>	<b>211.80</b>	<b>128.00</b>	<b>0.00</b>	<b>212.00</b>
R	2	30	DO	D2362	X	resin-based composite - two surfaces, posterior	170.00	105.90	84.00	0.00	86.00
						resin-based composite - two surfaces, posterior	170.00	105.90	84.00	0.00	86.00
						<b>Subtotal</b>	<b>340.00</b>	<b>211.80</b>	<b>168.00</b>	<b>0.00</b>	<b>173.80</b>
Crowns	3	3		D2740		crown - porcelain/veneer	265.00	0.00	84.00	0.00	84.00
	3	3		D2960		Base Crown	0.00	X	0.00	0.00	0.00
	3	3		D2960		core buildup, including any pins when required	177.00	0.00	141.80	0.00	35.40
						<b>Subtotal</b>	<b>1145.00</b>	<b>0.00</b>	<b>225.80</b>	<b>0.00</b>	<b>219.40</b>
Widow	17			D2340		removal of impacted tooth - completely bony	351.00	0.00	280.00	0.00	70.00
						<b>Subtotal</b>	<b>351.00</b>	<b>0.00</b>	<b>280.00</b>	<b>0.00</b>	<b>70.00</b>
						<b>Total</b>	<b>2176.00</b>	<b>423.60</b>	<b>1202.40</b>	<b>0.00</b>	<b>873.80</b>

Family Insurance Benefits

Benefit Name	Primary	Secondary
Family Maximum		
Family Deductible		

\$500 Total.

8. Announce on the ear that a treatment plan is ready and in what op # Change status on appt book to "tx plan ready"

\*\* Please note the front desk is busy at times and can't attend to patients quickly. It is your responsibility to make sure you check on patients **EVERY 5 MINS** and remind the tx coordinator that your op is still waiting on tx plan.

\*\* When the treatment coordinator is ready to present to your patient it is important to communicate any information pertaining to the treatment plan (patients chief complaint, last time they have seen a dentist, time / money restrictions etc) DO NOT let your financial coordinator walk into a situation blind!

## J. Clinical Notes

- All notes **MUST** have Doctors and RDH's initials.
- Important entries such as problem patients, pregnancies, complaints, bad behavior, medical alert, etc. will be created as a POPUP.
- Must enter blood pressure on every patient even if it's just a post op visit.
- Clinical notes should be done prior to dismissing your patient. Use the time you're waiting for the patient to get numb or waiting for the doctor to numb to do your notes. There are times where the schedule does not allow this, however, all notes must be done before leaving for the day.

The screenshot shows the 'Procedure Info - Test' window in a dental software application. The 'Auto Note' button is circled in red. The window displays patient information, procedure details, and a list of previous procedures.

Date	Th	Surf	Dx	Description
14	MO			resin-based composite - two surfaces, posterior
17	MDL			resin-based composite - three surfaces, posterior
19	MOD			resin-based composite - three surfaces, posterior
20				Watch
04/24/2020				7.WHAT TO EXPECT INITIAL VISIT
04/24/2020				6 HIPAA
04/24/2020				5 DENTAL X-RAYS
04/24/2020				2 MED HX NEW PT
04/24/2020				4 WEBSITE CONSENT
04/24/2020				1 INSURANCE/REGISTRATION FORM
06/03/2020	28	MO		resin-based composite - two surfaces, posterior
06/03/2020	30	MOD		resin-based composite - three surfaces, posterior
06/10/2020	21	DL		resin-based composite - two surfaces, posterior
07/15/2020				3 FINANCIAL AGREEMENT
05/12/2021				Deleted Appointment & saved note: CmpEx, FMX, DO
12/15/2021				PEREX, PA, PA+, 4BW, Pro, 2
12/15/2021				periodic oral evaluation - established patient
12/15/2021				intraoral - periapical first radiograph
12/15/2021				intraoral - periapical each additional radiographic image
12/15/2021				bitewings - four radiographic images
12/15/2021				prophylaxis - adult
12/15/2021				topical application of fluoride - excluding varnish

- Enter the clinical note from the Patient Chart.
- Double click on the Procedure note. Procedure Info box will pop up as shown above.
- Click **Auto Note** choose a custom template and change any information that does not pertain. \*A clinical note can be edited or the date can be changed as long as the month has not been closed, and the doctor hasn't signed it yet. If the month has been closed out you must create a new note referencing the previous note.
  - If you are unsure how to write a note, always ask for help.

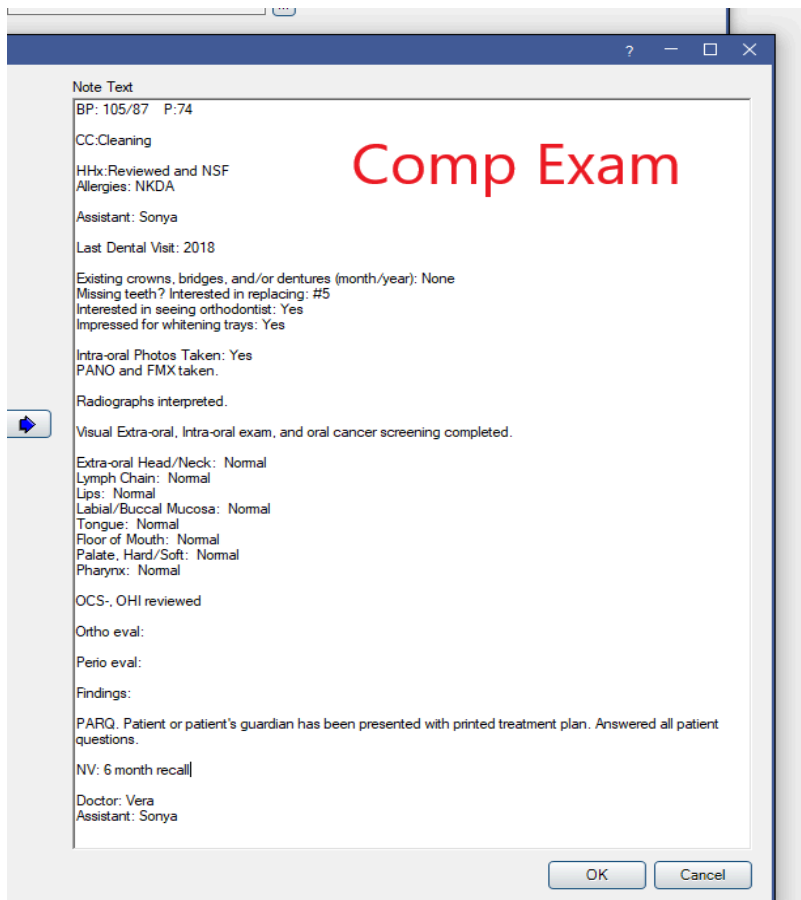
The screenshot shows the 'Compose Auto Note' window. A list of templates is displayed on the left, and the 'Insert' button is circled in red.

The screenshot shows the 'User' window. The 'Auto Note' button is circled in red. A list of notes is displayed on the right.



The clinical notes must be extremely accurate, thorough, and legible. Inevitably, patients complain. When they do, our “protection” is our records. Progress notes should be an account of what happened, pure and simple.

### EXAMPLES BELOW:



The image shows a screenshot of a dental progress note form titled "Comp Exam". The form is displayed in a window with a blue title bar and standard window controls. The text is organized into sections, with some items indented. The form includes fields for patient information, clinical findings, and treatment plans. The text is as follows:

Note Text

BP: 105/87 P:74

CC:Cleaning

HHx:Reviewed and NSF

Allergies: NKDA

Assistant: Sonya

Last Dental Visit: 2018

Existing crowns, bridges, and/or dentures (month/year): None

Missing teeth? Interested in replacing: #5

Interested in seeing orthodontist: Yes

Impressed for whitening trays: Yes

Intra-oral Photos Taken: Yes

PANO and FMX taken.

Radiographs interpreted.

Visual Extra-oral, Intra-oral exam, and oral cancer screening completed.

Extra-oral Head/Neck: Normal

Lymph Chain: Normal

Lips: Normal

Labial/Buccal Mucosa: Normal

Tongue: Normal

Floor of Mouth: Normal

Palate, Hard/Soft: Normal

Pharynx: Normal

OCS-, OHI reviewed

Ortho eval:

Perio eval:

Findings:

PARQ. Patient or patient's guardian has been presented with printed treatment plan. Answered all patient questions.

NV: 6 month recall

Doctor: Vera

Assistant: Sonya

OK Cancel

## K. Prescriptions

Drug	Controlled	Prescription	Disp	Refills	Notes
Amoxicillin 125mg/5mL		Take 1 tsp (5mL) q6h until all finished	150 mL	0	25-35 lbs
Amoxicillin 250mg/5mL		Take 1 tsp (5mL) q6h until all finished	150 mL	0	45-55 lbs
Amoxicillin 250mg/5mL		Take 1.5 tsp q6h until all finished	225 mL	0	55-65 lbs
Amoxicillin 250mg/5mL		Take 2 tsp (10 mL) q6h until all finished	300 mL	0	70-80 lbs
Amoxicillin 500mg		Take 4 tabs po 1 hour prior to dental appointment	8	2	(Pre-Med)
Amoxicillin 500mg		Take 1 tab po q6h until all finished	21	0	
Augmentin 500mg		Take 1 tab po q6h until all finished	30	0	
Cindamycin 300mg		Take 1 tab po q6h until all finished	21	0	
Cindamycin 300mg		Take 2 tabs po 1 hour prior to dental appt	4	2	(Pre-Med)
Cindamycin 75mg/5mL		Take 1 tsp (5mL) q6h until all finished	150 mL	0	20-43 lbs
Cindamycin 75mg/5mL		Take 1.5 tsp q6h until all finished	225 mL	0	45-55 lbs
Cindamycin 75mg/5mL		Take 2 tsp (10 mL) q6h until all finished	400 mL	0	75-85 lbs
Cindamycin 75mg/5mL		Take 2 tsp (10 mL) q6h until all finished	300 mL	0	90-75 lbs
Debracetol		Break internal glass tube, touch saturated cotton tip to ulcer. Hold in place for 20-30 seconds	1		
Diffucan 150mg		Take 1 tab po the first day. Repeat in 2-3 days if necessary	5		
Flexeril 5mg		Take 1 tab po before bed for 3 night. After that, take 1 pill	5	1	
Halcion 0.25mg		Take 1 tab 1.5 hr. prior to dental appt	2	0	
Magix Mouthwash		1 part Dulcithoxydine 15.5mg/5mL, 1 part Viscous Iodocaine 2%, 1 part Melexol	240 mL		
Neoral Dose Pack		Swish 5mL for 15 seconds q4-q6h, then spit	1 pack	0	
Morin 600mg		Take as directed	20	0	
Morin 600mg		Take 1 tab po q6h as needed for dental pain	20	0	
Peridol		Swish 15 mL for 30 seconds before bed, then spit. Repeat nightly for 2 weeks	1 pint	0	Chlorhexidine Mouthwash
Phenegan 25mg		Take 1 tab po q6h for nausea	24	0	
Prevident 5000, Booster		Brush for 2 minutes. Then spit excess. Do not rinse	1	3	
Prevident 5000, Sensitive		Brush for 2 minutes. Then spit excess. Do not rinse	1	3	
Tramadol (Ultram) 50mg		Take 2 tabs po q4-6h as needed for dental pain	36		
Tylenol #3 30/300mg		Take 1 tab q6h prn dental pain	20	0	Acetaminophen & Codeine
Ultracet		Take 2 tabs q4-q6h prn dental pain	36	0	Tramadol & Acetaminophen
Valium 5mg		Take 1 tab in the evening before bed and 1 tab	2	0	

- To print a prescription for a patient, click on the **prescription icon** on the toolbar. The prescription dialog box will appear.
  - Select the prescription(s) needed from the list and hit print.
- Make sure to change any instructions, qty. or refills per doctor's requests.
  - ALWAYS** double check the patients' medical history for allergies to certain medications.

- If the patient would like their prescription called in let them know to have it ready when you walk them to check out. **If doctor prescribed Tylenol #3 inform them we can not call that in. They have to bring the prescription into the pharmacy themselves.**
- Do not give the patient the printed out prescription, draw a line through it and put it in the shredder.

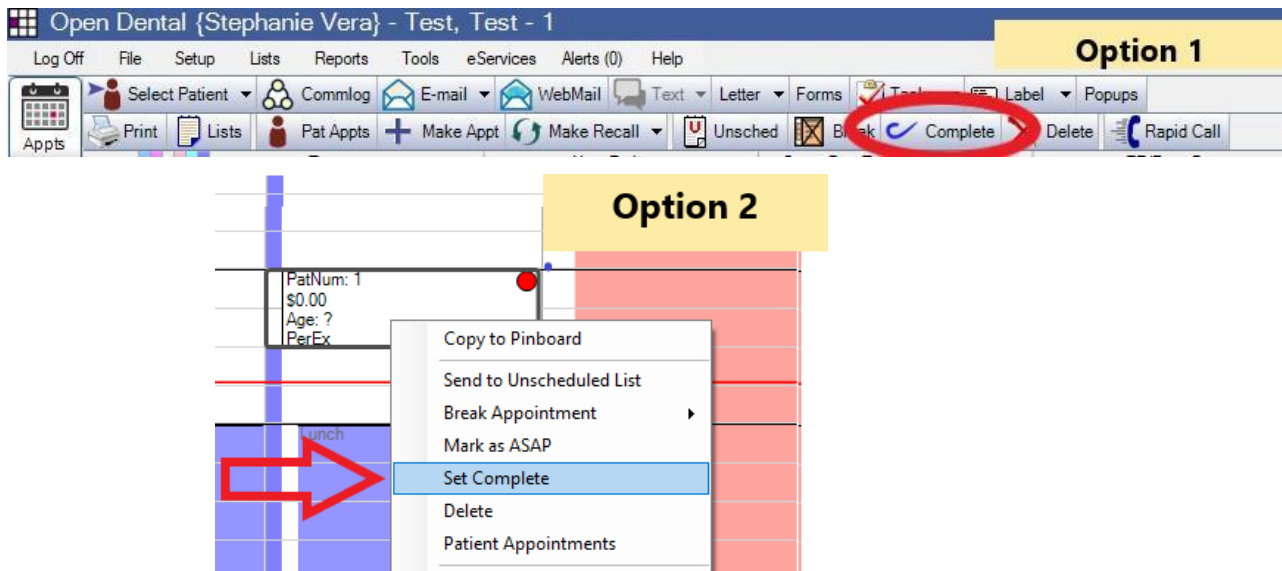


## L. Patient Dismissal

1. Make sure you have gone over any **post-op instructions** that pertain to the patient.
2. **Always** walk the patient to the front, **introduce** the patient to the person you are handing them off to and **Thank** them for coming in. A patient should **NEVER** walk themselves out or stand unattended up front.

**“This is Mr./ Mrs. Coughlin from OP# \_\_\_\_\_ we did \_\_\_\_\_ for him/her today and we need to get them scheduled back for \_\_\_\_\_. Thank you, have a great day and see you next time. “**

- Make sure all procedure have been **set complete** the correct way. ( from either right clicking on patients appt and then selecting **set complete, option 1** or select patients appt and click **complete** the top toolbar **option 2**) All appointments should be set complete to the correct provider



- Provide your patient with a goody bag before dismissing them and make sure they have their whitening trays. \* **Remind them every time they come in for their 6 month recall they will receive a free whitening syringe or if they write a review.**

## **M. Scripts / Verbal's**

Scripts for RDH's: Comp Exams

Remember to make the patients feel special. People will not necessarily remember everything you tell them but they will remember **HOW YOU MADE THEM FEEL.**

While walking into the pano room:

***"Hi Mrs. Smith, my name is \_\_\_\_\_. Is this your first time at Thrive? Great, I'm so glad you chose us! I'm going to start by taking a 360 xray that spins around your head."***

Panorex completed:

***"Ok now we will head to your room to complete the rest of the xrays"***

Take pano then walks to opertory and start your scripts

***" Are there any main concerns before I get started with your x-rays? And would you be interested in a complimentary Ortho consultation?"***

***"I am going to start by taking a full mouth set of x-rays. I will also take some photos of your teeth.***

***We offer Netflix and headphones for your entertainment. We also have blankets and pillows for your comfort.***

***Are you interested in our complimentary whitening trays? You will get a free whitening syringe at your recall visit and can get more syringes for every review you leave us. (Google, Facebook, Yelp etc)***

***We work as a team of doctors to provide you with the best level of care. If you fall in love with any of our providers today, and you will, feel free to request them for future visits.***

***Dr Christine will be right in to get your exam started. Please feel free to ask her any questions you have. While you wait for our treatment coordinator to come in, we will play some quick educational videos about your treatment.***

***Here are our Thrive sunglasses to protect your eyes from the light. Can I offer you any water while you're waiting?"***

***Be sure to check in on patients every 5 mins by asking them if they need anything/letting them know that the doctor will be in shortly.***

***When doctor enters, make sure to take notes for the doctor in the opendental chart.***

After treatment is completed:

Make sure to give the patient a warm lavender infused towel

***“Here is a warm, lavender-infused towel to wipe your face and soothe you”***

Walk pt to the check out desk:

***“Hey Sam, this is Mrs Smith. She got all 4 fillings done on her right side. She also got her SRP done with Salam. She loves Dr Christine and Salam and would like to stay with them at her future visits. I went ahead and put fluoride on her teeth today as well. Salam scheduled her perio maintenance visit in 4 months. Dr Christine would like to see her back as soon as possible for the crown on the left side.”***

**Keywords to mention:**

- Complimentary Ortho
- Full mouth set of Xrays
- Photos
- Netflix, headphones
- Blankets, pillows
- Complimentary whitening trays
- Free whitening syringes
- Team of doctors
- Mention doctor's name
- Educational videos
- Thrive sunglasses
- Water
- Check in every 5 mins

**Check out keys:**

- Introduce the patient
- Warm lavender towel
- Treatment done today
- Doc/Hygiene seen today
- If patient requests doc/hygiene
- Fluoride
- Perio recall visit
- Next visit for treatment

**Verbal's:**

Patients that complain about Doctors

Inform patients that the doctors are highly trained and all practice the same.

They may **Request** a certain Doctor or to remain with that doctor at all times for their procedures let

them know we will do our BEST to accommodate them with that request.

### **Patient has pain after dental treatment**

If the patient has pain after a dental treatment they can get upset. They do not understand the intricacies of treatment and that the teeth may be sore after we removed excessive cavities. You can offer a kind explanation and reassure them you will find a solution.

Remember whenever a patient is in pain show empathy and comfort them! Let them know you will help them find a solution and because you are not the treating dentist you may not have the solution but we can bring them in to have the doctor take a look at them.

***“Mrs. Smith I’m sorry you are having pain. Let’s get you in to see Dr. \_\_\_\_\_ as she is an excellent doctor and I’m sure she can help find a solution. A lot of times it’s something as simple as a bite adjustment but there is no way to tell for sure unless we see you. Are you available to come in today at \_\_\_\_\_?”***

This will work for the vast majority of patients. Something to keep in mind is that even the best doctors cannot really diagnose over the phone so they will need to see the patient. But, If the patient absolutely insists on talking to the doctor, inform the treating doctor and have them call the patient ASAP.

It is vital for us to treat these patients quickly as no one wants to be in pain and they associate the pain with our office. Make sure to notate the conversation in the CommLog.

### **Overall scripts**

If you do not have the answer to a patient's question do not make one up. Simply let the patient know you will find a solution and either get someone who can help them or take a message.

***“Mrs. Smith, I am more than happy to help you. I want to get you the most accurate answer possible so I am going to place you on a brief hold while I transfer you to one of our specialists.”***

## **N. Equipment Repair**

Learn to do minor repairs by yourself or ask someone who has repaired/replaced it before. Most of the office supplies we get are from Amazon or similar companies. If it is a fix that is less than \$200 ask your manager to replace/fix it.

Many issues can be repaired with a quick reset or small replacement.

### Office Equipment

1. Try to fix the problem yourself
2. Check for warranties.
3. If you have tried resets, tightening bolts, changing batteries, unplugging, and replugging in cords then call the appropriate person.
  - a. Ben is our IT specialist for computer setups etc (we rarely need to call him)
  - b. Each office has its own internet provider
  - c. Mango is our phone and fax provider
4. In an emergency call Sonya
5. Anything under \$200 confirm with your manager and replace the item.

### Clinical Equipment

1. Once again try to fix it yourself as most issues are just a tightening of a loose bolt.
2. Inform the regional RDA of the issue if you cannot fix it.
  - a. They will call southwest or the appropriate company
3. In an emergency call Sonya.
4. Anything under \$200 confirm with your manager and pay it with the office credit card.
  - a. Keep all quotes/receipts.

## O. Thrive Standards

# THRIVE EXPERIENCE

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*Thrive is the STANDARD of Dentistry in Texas*

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We do EVERYTHING in our power to remove dental fear and anxiety. We go above and beyond to deliver an OUTSTANDING dental experience.

01

### Front Area Presentation

1. Always have the diffusers going with at least 20 **drops** of Peppermint oil. Clean diffusers daily.
2. Keep front desk area extremely tidy and free from clutter. No personal items out.
3. Keep entire office extremely clean, tidy, and stocked.



02

### Patient walks in

1. Stand up, smile, and greet patient by **name** and say, "Hi, {Name)! Welcome to Thrive!"
2. Greet the children - from the youngest to the oldest, ask them their names and ages. Take kids straight to the treasure chest when they arrive.
3. Give patient a New Patient goody bag and cell chem the contents of the bag: "Thank you for choosing Thrive! This is our gift to you. Here is a booklet that Dr. Christine made for you. You get a FREE Thrive! Electric Toothbrush! You also get a Gift Card for \$200 Off Zoom Whitening!"
4. Reassure your patients. Play up your doctor and team: "You will love Dr. \_\_\_\_\_ (name) and our team! You are in the best of hands!" (Always use the **names** of the team and patients).
5. Offer a beverage while they wait: "Please help yourself to water or coffee." \_\_\_\_\_

03

### RDA

1. Calls patient by **name** - smiles and greets them.
2. Offers to take their purse or jacket to set it on the side chair.
3. Offers blanket, pillow, headphones, sunglasses, and show to watch.
4. Tell them "Dr. \_\_\_\_\_ will be here shortly. You will love him/her!"
5. Find out one key personal fact and write it down in upper left box of patient chart.
6. Find out patient's chief complaint. Take notes for any questions that the patient has and let the doctor know.
7. RDA tells doctor the patient's name, one key personal fact, and their chief complaint.
8. Have patient watch the New Patient Welcome Video and say, "Here is a welcome message to you from our owners, Drs. Christine & Nathan." (see Script for free whitening).
9. Have patient's chart open for the doctor to see.
10. Take detailed notes for the doctor of all that is discussed with the patient throughout the visit. You are the doctor's scribe.



04

### Doctor enters

1. Enters room, "Hi, {patient's name}! It's so nice to meet you! Thank you for choosing Thrive! We're going to take amazing care of you!"
2. Doctor repeats what the RDA reported to them: one key personal fact, chief **complaint**
3. Take a couple minutes to get to know the patient as a person and answer their questions. Show empathy, warmth, and confidence.
4. **RDA** - documents all chat was discussed by patient and doctor.
5. Doctor presents rx plan - shows the **intra-oral photos**.
6. Doctor plays up ex coordinator, "Our manager, \_\_\_\_\_ {name}, is coming in to help you get the most out of your benefits. You will love her! She's going to take amazing care of you."
7. **RDA** plays **dental educational videos** (Bice Bank) pertaining to any **major dental procedures** planned by doctor. ie) tooth loss, implant, bone graft.

05

### Tx Coordinator (see scripts)

Asks patients for reviews and referrals for more discounts and \$100 for every patient they refer.

06

### During & After Treatment

Doc and team are extremely attentive to make sure patient is always comfortable. Treat patient like they're the only patient there. RDA brings patient a warm towel on plate, and says, "Here is a warm, lavender-infused Lowe/ to wipe your face." (Don't just offer it. Bring it.)



07

### Hand-off

**RDA** brings patient to the front and **hands off** to check-out team member, addressing the patient by name and telling check-out exactly all chat was completed, and what we're doing at the next visit, and when.

08

### Check Out

Thank patient for choosing Thrive.  
During check-out, set aside the New Patient **Thank You** Card to send out same day.

09

### New Patient Visit Follow Up

1. Write a hand-written New Patient Thank You Card to send out that day.
2. Call patient the **next day**: "on behalf of Dr. \_\_\_\_\_ and our team, thank you so much for joining our Thrive family! We're so grateful you chose us as your new dental home! We will take amazing care of you! We are always here for you if you need anything."
3. If patient doesn't answer, leave a **voicemail** and then follow up with a **text message** saying the same thing.

