



THRIVE

DENTAL & ORTHODONTICS

Hygiene Training Checklist and Evaluation

Employee Name: _____

Start Date: _____ **Location:** _____

This document will update you on your training progress, showing where you are compared to the required goals. It includes a rating scale done by your lead to highlight your current performance and areas for improvement to complete the training successfully. Anything below the lowest score is failing and will require additional training.

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)**
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Categories and Checklist

1. Infection Control and Sterilization:

- Disinfect and sterilize instruments and trays per OSHA protocol
- Disinfect and break down rooms properly
- Understand cross-contamination
- Understand proper biohazard protocol (sharps)
- Bag instruments correctly
- Knows the location of hygiene material (hygiene packs, prophylaxis paste, fluoride, etc.)

Score/ Hygiene Lead initials: wk1_____ wk2_____

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 patient's name, one key personal fact, and chief complaint
- Show New Patient Welcome Video
- Have patient chart open for the doctor and x rays
- Take detailed notes throughout the exam for doctor
- Offer warm lavender towel before dismissing patient

Score/ Hygiene Lead initials: wk1_____ wk2_____

3. Administrative Skills:

- Split appointments (exam/cleaning) and place initial at bottom of appointment
- Knows how to book appointments (Recalls, perio maintenance, and other half of SRP)
- Understands scheduling (color coding and dots on schedule)
- Labels PAs for Recall appointments
- Text patients (SRPs, recalls) on Modesto to fill hygiene schedules
- Next day post op calls for SRPs

Score/ Hygiene Lead initials: wk1_____ wk2_____

4. Team Management:

- Sets up trays before morning huddle
- Communicates well with front and back staff efficiently
- Helps seats treatment patients when not busy
- Helps with breaking down ops or communicates when it is needed

Score/ Hygiene Lead initials: wk1_____ wk2_____

5. Patient Management:

- Bring patients back in a timely manner (no more than 5-minute wait)
- Take Vitals, Gather medical and dental histories (Inform doctor)
- Stress Thrive Experience
- Make sure next appointment is made before check out
- Makes sure all patients leave with a goodie bag
- Patient handoff at checkout (complete cleaning correctly and inform front desk of pending treatment)

Score/ Hygiene Lead initials: wk1_____ wk2_____

6. Patient Appointment:

NEW PATIENT/RECALL APPOINTMENT

- Time management on exam and x-rays (15-20 minutes)
- Use intra-oral camera to obtain quality images (no silva bubbles)
- Obtain quality FMX or RECALL x-rays in 15 minutes (no overlapping, no cone cuts, visible apex/incisal edge, no teeth cut offs)
- Probing correctly and in a timely manner before doctors enter op
- Chart existing restoration and missing teeth
- Create treatment plans
- Create specialty referrals
- Use and input appropriate template notes for doctors for new patient/recall patient
- Explain at-home whitening tray instructions clearly and effectively
- Print Rx from Open Dental
- Building rapport with patient (1 fact)
- Making sure to ask for review

PROPHY/DEEP PROPHY (4346)

- Time management (15-20 minutes)
- Patient education: give tips for improvement

PERIO MAINTENANCE

- Time management (15-20 minutes)
- Patient education: importance of maintaining 3 mos recall

SCALING AND ROOT PLANING

- Time management: All 4 quads (45-60 minutes)

- Time management: 2 quads (20-30 minutes)
- Patient education: importance of deep cleaning

Score/ Hygiene Lead initials: wk1_____ wk2_____

7. Cleaning of upper management teeth:

- Thrive Experience (pillow/blanket/netflix/lavender towel)
- Gentleness of cleaning (any discomfort, cuts of tissue, suction of tongue, cheeks, lips)
- Cleanliness after cleaning (prophy paste on face, water splashing)
- Feeling of teeth after cleaning (any roughness, do teeth feel smooth)
- Overall experience

Score/ Hygiene Lead initials: wk1_____ wk2_____

8. Evaluation by Senior Doctor(s):

- Patient interaction and chairside manner
Take diagnostic x-rays, clear intraoral pics
- Communication with doctors about patients and chairside manner with patients
- Probing before appointments and ability to assist in diagnosis of cleanings (prophy, 4346, SRP 1-3 or 4-8)
- Maintain a strong sense of urgency to ensure efficiency and workflow optimization

Score/ Hygiene Lead initials: wk1_____ wk2_____

Senior Doctor Feedback & Recommendations:

Areas of improvement:

Week 1

Week 2

Final Training Evaluation

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

Trainee's Signature: _____ **Date:** _____

Trainer's Signature: _____ **Date:** _____