

Lead 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, OM and Senior Doctor 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 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:

- Compliance with OSHA and CDC infection control protocols
- Disinfect and sterilize instruments and trays
- Disinfect and break down rooms properly
- Understand cross-contamination
- Understand proper biohazard protocol (sharps)
- 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)
- Keep track of sterilization logs and documentation for compliance.
- Know how to identify and change amalgam traps as needed
- Ensure all team members are wearing proper PPE (gloves, masks, eyewear, etc.)
- Understand the immediate steps to take in case of a needle-stick injury (flush wound, report incident, follow post-exposure protocol).

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 patients 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/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

3. Administrative Skills:

- Inventory & supply management
- Managing budget and cost control for materials
- Answer phone calls when needed and schedule appointments
- Understands scheduling (color coding and dots on schedule)
- Scan and input lab Rx information
- Understanding HIPAA regulations and patient confidentiality
- Ensure patient schedules are correctly updated and communicated to the dental team.
- Know the office's emergency response plan, including Code Blue protocols (cardiac arrest, medical emergencies).
- Keep emergency medical kits readily available and ensure they are fully stocked
- Know where fire extinguishers and first aid kits are located.
- Understands when to call for repairs and who to contact for specific equipment malfunctions (e.g., dental chairs, nomads, handpieces).
- Track the status of repair requests and follow up until resolved.
- Coordinates schedule with dentists and back staff to manage patient flow and avoid delays

Score/ Lead initials: wk1_____ wk2_____ wk3_____ wk4_____

4. Patient Management:

- Effective patient communication and education
- Direct complex patient concerns to the appropriate team member or dentist
- Ensure patients feel comfortable and well-cared for during their visit.
- Ensuring proper post-operative care instructions are provided

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
- Knows how to use the Itero scan for (nightguards,crowns,invisalign)

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
- Prepares ahead of time with lab cases to ensure it's in office.

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):

- Demonstrates strong leadership skills
- Encourages teamwork and maintains a positive work environment
- Mastery of chairside assisting techniques
- Handles instruments and equipment with expertise
- Follows office protocols and workflow standards

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

- ◆ Average Score: _____
- ◆ Final Decision: Pass | Fail
- ◆ Additional Training Required? YES / NO

Trainee's Signature: _____ Date: _____

Trainer's Signature: _____ Date: _____