



# DENTAL APPOINTMENT CHECKLIST: PREPARING FOR THE DENTAL APPOINTMENT

## FACT SHEET

Client Name: \_\_\_\_\_

*Instructions: Staff to initial each area as completed. Document any comments related to the completion of each task in the space provided. Forward or file completed checklist according to agency protocol.*

### Checking in and waiting area

- \_\_\_\_\_ 1. Check in; introduce yourself and the individual.
- \_\_\_\_\_ 2. Tell them why you are there; encourage person to participate as able
- \_\_\_\_\_ 3. Discuss accommodations needed in waiting room such as a more private space.
- \_\_\_\_\_ 4. Provide information as requested such as insurance information, photo identification
- \_\_\_\_\_ 5. Maintain a positive, supportive environment while waiting. Engage the person in preferred activity as needed
- \_\_\_\_\_ 6. If need to leave waiting area, alert the receptionist and establish a method for him/her to contact you. Do not leave the individual alone in the waiting room

### In the examination room

- \_\_\_\_\_ 1. Provide any health care visit/consultation type form, other health-related information, and review the reason for the appointment.
- \_\_\_\_\_ 2. Review any concerns or questions that you were asked to relay from other team members.
- \_\_\_\_\_ 3. Ask that the dental professional communicates directly with the individual. Explain the best way to communicate and interact with the individual that will increase cooperation.
- \_\_\_\_\_ 4. Stay with the individual to provide support and assist with communication.
- \_\_\_\_\_ 5. Refer to a person in the provider agency, a guardian, or to written information if you do not know answer to the dental provider's question.



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- \_\_\_ 6. Talk with the health care provider about challenges that may occur during the exam or procedure; don't wait until they occur.
- \_\_\_ 7. Help with explaining things and providing support to the individual during the exam or procedure. This may include providing diversions or requesting shorter, simpler events or steps with breaks in between.
- \_\_\_ 8. Help with transfer and positioning.
- \_\_\_ 9. If the exam/procedure is not completed, make sure the reason for not completing the exam/procedure is documented on health care visit/consultation form along with written recommendations for addressing future steps.
- \_\_\_ 10. DO NOT give verbal or written consent for invasive procedures—refer the dental provider to the guardian or health care representative if individual cannot give own consent.
- \_\_\_ 11. Encourage the use of the least invasive procedures possible.
- \_\_\_ 12. Discuss whether there are any new diagnoses, orders, or recommendations.
- \_\_\_ 13. Discuss the need for the dental provider to write new orders for medications, instructions for treatments, or needed monitoring, and any other recommendations or orders necessary for the management of the health issue on the provided health care visit/consultation form.
- \_\_\_ 14. Discuss the reason for any new medications and whether there are any special instructions related to the use of the medication including times to administer, methods of administration and anticipated side effects.
- \_\_\_ 15. Discuss when any new medications should begin.
- \_\_\_ 16. Make sure that any medications that are to be discontinued have specific orders for the discontinuation.
- \_\_\_ 17. Discuss whether any monitoring/observation is necessary and what would prompt a call or follow-up appointment to the dentist.
- \_\_\_ 18. Discuss whether any follow-up procedures or appointments are necessary.
- \_\_\_ 19. Ask how the results of any tests will be obtained and/or communicated.



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- \_\_\_\_\_ 20. Make sure all instructions, recommendations, and orders are written on the health care visit/ consultation.
- \_\_\_\_\_ 21. Read orders and recommendations back to the health care provider to ensure they are legible and understood.

### Checking Out

- \_\_\_\_\_ 1. Schedule any follow up appointments, tests or procedures as ordered before leaving the office.
- \_\_\_\_\_ 2. Make arrangements for payment or reimbursement as needed.

