

Create the Ideal Hygiene Handoff Collaboration Guide

Teamwork is Key to Success in Hygiene

A seamless hand-off is crucial to the patient experience, as well as to a dental team's efficiency in avoiding daily chaos. It takes preparation to ensure clear communication regarding today's findings, treatment changes, financial presentations, and scheduling. Synchronizing these elements, along with accurate coding and billing, requires teamwork from both front and back office staff. This guide is designed to help your team discuss both clinical and business aspects, ensuring smooth hand-offs, even when challenges arise. Take notes on verbiage to enhance your process!

Doctor Exam Preparation Checklist

Prepare for the Doctor's Exam: What the Doctor Typically Expects from the Hygienist. Use the following checklist to align with the Doctor's expectations before they enter the room for an exam. If multiple Doctors are involved and each has different preferences, work together to find common ground that can be applied universally.

Assessments	Yes	No	N/A or Not Interested
Updated all necessary x-rays (major films & Bwx)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAs of ALL Endo teeth and implants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overjet findings reviewed with patient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shade Assessment completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intra oral pictures of all 3 + surface fillings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discussed Cosmetics/Veneers/whitening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wellness Scan completed initiated clear aligner dialogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wear Facets/Occlusal assessment completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed unscheduled treatment needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clinical Team Collaborative Discussion Topics

- | | | | |
|-----------|--|-----------|---|
| 01 | Will Hygienist introduce the doctor to patient, or will Dr. introduce him/herself? | 04 | If no restorative is identified, should the hygienist begin cosmetic discussions with patients? |
| 02 | Should the hygienist begin with Restorative or Perio findings at the start of the exam? | 06 | What is the deciding doctor criteria for recommending crown vs. filling? |
| 03 | How best should the hygienist share assessment findings (verbally or written note)? What information should be shared? Medical considerations (medications), Perio charting (including BOP, CAL bone loss %.), unscheduled treatment, other information. | 07 | Should Hygienist open restorative patient dialogue? |
| 05 | What should be displayed on the monitor as the doctor begins the examination (IO pictures, current x-rays, Scan, Overjet etc.)? | 08 | Do you use a route sheet in the office currently? Should it be revised? |

Clinical and Business Team Collaborative Discussion Topics

To help align the entire team from front to back, below are some questions to consider for discussion. These will ensure that every team member understands their role and knows how to provide exceptional service while maximizing treatment enrollment.

1. Who presents the clinical part of the treatment plan?
2. Who presents the financial options to the patient?
3. Describe the ideal hand-off?
4. What are the expectations for scheduling priority patients?
5. What is the best way to communicate that the patient is not moving forward with recommended treatment plan, and how the Doctor or Hygienist wants the business team to follow up with the patient?

Other notes:

[Space for additional office-specific process highlights]

Our Office Hygiene Handoff

Hygiene Handoff

Notes:

After completing the Creating the ideal hygiene hand-off Discussion Guide
Fill this out for your office hygiene hand-off process

Hygienist Completes the following assessments

[List of assessments the hygienist must complete] _____

Hygienist Communicates Patient is Ready

[Steps or methods used to communicate readiness] _____

Route Sheet is Used

[Describe if/how the route sheet is utilized during the handoff] _____

Hygienist Communicates to Doctor Over Patient in priority order

[Clarify the priority order for communication between hygienist and doctor] _____

Available On Operatory Monitor:

[List what information is displayed on the operatory monitor] _____

Other Notes:

[Space for additional office-specific process highlights] _____

Hygiene Route Sheet Template

Notes:

After completing the "Creating the Ideal Hygiene Handoff" Discussion Guide, update your hygiene route sheet.

Sample Hygiene Route Sheet

Hygiene Exam Assessments Completed	Data Details for Doctor
In preparation for the hygiene exam, hygienist should have all assessments completed and on monitor for doctor to view: <ul style="list-style-type: none">• Current x-rays/IO pictures• Patient chart open• Pending treatment plan• Most recent Perio chart	
Patient chief complaint	
Medical history updated	Patient medications:
Perio charting completed	Date:
Perio Stage: Perio Grade:	
Updated necessary x-rays	X-ray type
Intraoral pictures taken	Tooth#: Reason:
Reviewed outstanding restorative treatment needed with patient prior to exam	Patient reason for not moving forward with treatment:
Suspect restorative teeth	Tooth numbers: Surfaces:

Other Notes:

[Space for additional office-specific process highlights]