Dental Assistant Training Plan
Packet includes: 30/60/90 game plan, positions checklist & scorecard

Job Description: Provide the doctor with assistance in all clinical procedures of treatment and to make the patient as comfortable as possible as the treatment is taking place.

Goal: Become fully trained as a dental assistant, mastering all duties and tasks assigned within 90 days post-employment start date and during the duration of employment.

Dental Assistant Checklist- 30/60/90 Day Plan to Be Proficient In
1. Morning duties prior to patient arrival
2. Patient arrival duties
3. Post appointment duties
4. Morning huddle prep
5. End of day duties

What each task includes:

- Morning Duties Prior to Patient Arrival
  - Room set up according to standardized protocol
  - All trays set for the remainder of the day
  - Double check all lab cases received

- Patient Arrival Duties
  - Greet patient within 5 minutes of patient indicator turning color
  - Seat patient in operatory
    - Adjust headrest to patient comfort
    - Change appointment status color to “in operatory”
    - Don patient bib
    - Take blood pressure
    - Ask patient three non-dentally related questions
    - Confirm consent forms are signed
    - Have “Operatory Preparation Sheet” ready for Dr review
    - Place patient protective eyewear on
  - Begin chart notes—add blood pressure to note as soon as blood pressure is complete
  - Place topical if needed
  - Get Dr and brief Dr in hallway
    - Has Dr met patient?
    - What procedures doing
    - Any concerns
  - Introduce patient to Dr

- Post Appointment Duties
  - Set appointment complete- confirm all procedures billed out properly
    - Exams under correct provider
  - Post Op instructions to patient if necessary
  - Final blood pressure taken for anesthetized patients
  - Confirm patient has recare appointment
  - Lab scripts are completed prior to dismissing patient
  - Complete route slip for front office handoff
  - No debris on patient’s face
  - Take patient to front office and recap with:
Today’s treatment
Next visit
Time needed for next visit
When next visit should take place
If patient (or family members) need recare appointments
  o Thank patient
  o Dismiss yourself
  o Complete treatment notes
  o Breakdown room
  o Sterilize instruments according to sterilization protocol
  o Post op calls on all patients from prior day completed daily

Morning Huddle Prep
  o Huddle form completed and ready for morning huddle
  o Plus treatment noted
  o Lab cases are all in- if not, alert front office
  o X-rays
  o Medical history checked

End of Day Duties
  o All chart notes completed for patients seen
  o All rooms set for next morning procedures
  o All casts pulled from models
  o All models poured and completed
  o All lab cases sent out
  o Computers turned off
  o All lines run
  o Assigned rooms stocked

Monthly
  ● Replace traps
  ● Spores testing
  ● Clean sterilizer

### Dental Assistant Scorecard

**30 Day Goals**

**Date for review:**

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Rate the following statements – 1 being strongly disagree, 5 being strongly agree
Clock in/out.
1 2 3 4 5

Arrive 30 minutes prior to first patient.
1 2 3 4 5

Set up room according to standardized protocols.
1 2 3 4 5

Make sure all trays are set for the remainder of the day.
1 2 3 4 5

Attend morning huddle 15 minutes before first patient is seen.
1 2 3 4 5

Double check all lab cases received.
1 2 3 4 5

Greet patient within 5 minutes of patient indicator turning color.
1 2 3 4 5

Seat patient in operatory, adjust the headrest for comfort and then don patient napkin.
1 2 3 4 5

Begin chart notes—add blood pressure to note as soon as blood pressure is complete.
1 2 3 4 5

Place topical if needed.
1 2 3 4 5

Brief with doctor in hallway before exam/treatment.
1 2 3 4 5

Introduce patient to doctor.
1 2 3 4 5

Thoroughly explain Post Op instructions to patient if necessary.
1 2 3 4 5

Take final blood pressure for anesthetized patients.
1 2 3 4 5

Confirm patient has recare appointment.
1 2 3 4 5

Ensure lab scripts are completed prior to dismissing patient.
1 2 3 4 5

Complete route slip for front office handoff.
1 2 3 4 5

Take patient to front office and recap.
1 2 3 4 5
Breakdown room.

1 2 3 4 5

Sterilize instruments according to sterilization protocol.

1 2 3 4 5

Ensure assigned rooms are stocked.

1 2 3 4 5

Make sure all rooms are set for next morning procedures.

1 2 3 4 5

Areas I feel I excel:

__________________________________________

__________________________________________

Areas I feel I need extra help on:

__________________________________________

__________________________________________

Goal for next 30 days:

__________________________________________

60 Day Goals

Date for review:

__________________________________________

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Perform all 30 day tasks with no supervision.

1 2 3 4 5

Have all models poured and completed.

1 2 3 4 5

Ensure all casts pulled from models.

1 2 3 4 5
Place exams under correct provider.
1 2 3 4 5

Complete all treatment notes.
1 2 3 4 5

Perform post op calls on all patients from prior day completed daily.
1 2 3 4 5

Track and make sure all lab cases are sent out.
1 2 3 4 5

Areas I feel I excel:

___________________________________________________________________________________________

Areas I feel I need extra help on:

___________________________________________________________________________________________

Goal for next 30 days:

___________________________________________________________________________________________

90 Day Goals

date for review:_____________________________________________________________________________

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Perform 30 and 60 day tasks with no supervision.
1 2 3 4 5

Prep for morning huddles.
1 2 3 4 5
Replace traps.
1 2 3 4 5

Perform spores testing.
1 2 3 4 5

Clean sterilizer.
1 2 3 4 5

Confirm all procedures are billed out properly.
1 2 3 4 5

Areas I feel I excel:
______________________________________________________________________________________________
______________________________________________________________________________________________

Areas I feel I need extra help on:
______________________________________________________________________________________________
______________________________________________________________________________________________

Goal for next 30 days:
______________________________________________________________________________________________