

Date: \_\_\_\_\_

## ASSISTANT'S CHART CHECKLIST

**Assistants:** Audit your patient charts before each day begins. At the Team Huddle, you will discuss what the other Team Members need to know about your patients to make the appointment efficient and productive.

Assess which patients need: Smile Evaluation (SE), Sleep Apnea Assessment (SA), Oral Cancer Exam (OC)

Patient's Name	Need New Med HX?	Need Next Hygiene Appt?	Need Restorative Appts?	Other (SE, SA, OC)	Family Members who need an appt & what it is for.

Patient I will ask for referral today: \_\_\_\_\_

Yesterday's Referral Name & Outcome: \_\_\_\_\_

Lab Cases Checked:  Yes     No    Patients missing a lab case: \_\_\_\_\_

Post-Op Calls Made:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_