Hygienist Handoff to Doctor Protocol

A verbal handoff from the Hygienist to the doctor is crucial in streamlining your communication with the doctor and assuring the patient that you’ve listened to any concerns they may have regarding their dental health. Use the following guidelines to ensure a smooth patient handoff to the doctor.

**Before the Doctor enters the room**

* Wait to call the doctor in for the exam until the patient is fully prepared.
* Ensure your periodontal and treatment charting are complete.
* Ensure the taken images are displayed on the monitor.
* If no new images were taken/needed, display existing images on the monitor.
* Ensure the pictogram is visible on the second monitor (which will note any diagnosed, untreated issues in red).
* Promote the doctor and assure the patient that they are in good hands.

**When the Doctor enters the room**

* Stand at the side of the room so that the conversation between you and the doctor is had in front of the patient.
* Introduce the doctor to the patient.
  + For returning patients, you might say, “You remember Katerina.” or “Katerina is back to see us.”
  + For new patients, you might say, “This is Katerina’s first visit to our office.”
* State when the doctor saw the patient last or what procedure was most recently started or completed at another office. Also note whether the patient’s cleaning is complete or in progress.
* Call the doctor’s attention to any special circumstances (e.g., serious medical conditions, medications, or patient demeanor). For example, you might say, “Katerina let me know she’s pretty nervous today, but I told her we’ll take great care of her.” However, if noting an unpleasant demeanor, speak with doctor out of earshot of the patient.
* Reiterate any concerns the patient mentioned during intake, and restate your response to the patient concern. For example, you might say “I let Katerina know we have been watching that for a bit and that you will probably be letting us know it’s time to take care of it.”
* Provide a general assessment of overall oral health. For example, you might say, “Katerina’s situation is pretty good overall. She uses a Waterpik and gets good results, but I’ve recommended more flossing in this area/mouthrinse to help with that concern.”
* State any new areas of concern that you’ve identified. For example, you might say “Doctor, could you take a look at this area? I let Katerina know that it warrants attention and that you would let us know what is needed.”
* Emphasize that the condition the patient has is progressive (i.e., will get worse over time) and the urgency of getting the treatment scheduled to avoid further deterioration of the condition.
* Provide a closing statement. For example, you might say, “I’ve recommended that Katerina go into our four month recall program to take care of that filling before her next hygiene appointment, but we’re anxious to hear what you think, Dr. \_\_\_\_\_\_\_\_.

Under normal circumstances, the entire handoff should take about 30 seconds. Here is an example of a full handoff script:

* “Hi, Dr. \_\_\_\_\_\_\_\_, you remember Katerina. You last saw her 8 months ago, and I’m just about to start her cleaning today. She doesn’t have any outstanding treatment, but she has a tooth that is bothering her on the upper left. The gum is swollen, and she has had some bleeding. I took an x-ray and let her know there may be a periodontal concern you’d want to talk about.”

It is important to remember that this type of handoff to the doctor streamlines our office processes and makes our patient visits more efficient. When we are more efficient, our patients are happier.