Lead Surgery Assistant Protocols

**General**

* Understand and competently execute the responsibilities, tasks, and protocols outlined on the Surgery Staff Checklist.
* Learn, adjust, and change as the practice and your job description changes.
* Maintain the work schedule in accordance with the surgery assistant job description as directed by the office manager.
* Maintain CPR/Radiology/DAANCE certification.
* Coordinate the work schedule with the office manager.
* Clock in daily to provide accurate time documentation in accordance with payroll protocols.
* Arrange for position coverage when taking planned time out of office, and obtain written authorization from the office manager for all overtime.
* Execute all computer procedures and protocols in accordance with company computer guidelines as directed by the office manager, and utilize password and security code protocols (e.g., for office security, computer password, etc.).
* Inform the office manager of any computer software or hardware errors, interruptions, or malfunctions in computer activity. Execute instruction as directed by the office manager.
* Ensure OSHA, Dental Board, insurance, state, federal, and DEA standards are met. Maintain patient and business records in accordance with laws, regulations, and CJS policies.
* Provide high quality patient care and communication.
* Ensure personal and professional confidentiality for all doctors, employees, and patients.
* Dispense all medications and maintain medication-dispensing records in accordance with DEA regulations and company medication dispensing protocols.
* Maintain equipment in accordance with the equipment maintenance schedules and protocols.
* Represent the doctor and team in a professional manner and in accordance with the communication, dress code, and business protocols.
* Schedule coverage if the doctor is out of town if there may be difficulty reaching them.
* Greet and dismiss all patients in accordance with the arrival appointment preparation, patient flow, and dismissal protocols.
* Communicate with the office manager immediately regarding system operations, operation weaknesses, problem solving, errors, unsatisfied patients, employee conflicts, injuries/serious events, and/or unhappy referring doctors.
* Communicate with employees, the doctor, and the office manager in a professional and courteous manner.
* Work in a professional manner whereby discussions with patients and referring doctors are professional, appropriate, respectful, confidential, and representative of the doctor's philosophy, business goals, office protocols, and procedures.
* Maintain a high standard of patient care.
* Assume the leadership roles and responsibilities for each patient's accurate treatment planning and treatment procedures.
* Obtain authorization from the office manager prior to proceeding with new tasks or responsibilities, or delegating tasks to other staff members.
* Continue to learn, communicate, and execute new patient care, office procedures, and protocols that keep the company current and compliant with changing laws, regulations, and medical standards. Review all changes with the office manager before changes are made.
* Attend all general and surgery staff meetings.
	+ Be attentive, take notes, and immediately execute protocols and procedures as discussed and instructed by the doctor or office manager.
	+ Understanding, execute, and comply with all information presented and discussed.

**Daily Tasks**

* Execute patient care in accordance with the patient care protocols and as directed by the doctor and office manager.
* Be flexible and receptive to the doctor’s needs when a change in protocol or procedure is needed.
* Maintain a positive and supportive atmosphere for all employees, patients, and family members.
* Ensure that patient care conversations are kept confidential.
* Answer patient follow-up care questions in accordance with the patient care documentation protocols and procedures.
* Receive, log, and confirm the doctor’s review of all models, stents, and prosthetics prior to patient treatment. Obtain the doctor’s initials on model boxes or containers.
* Execute projects and tasks as directed by the doctor and office manager.
* Obtain the daily checklist and post it on the cupboard in the laboratory.
* Accurately complete the daily task schedule duties in accordance with office protocols, policies, and procedures as directed by the office manager. Immediately inform the office manager of any unfinished tasks and their expected completion dates. Obtain authorization from the office manager to delegate assigned tasks to other team members as needed.
* Execute anesthesia assistant protocols, and accurately administer and document anesthesia medications in accordance with anesthesia and medication protocols.

**Preparation for Patient Care**

* Oversee the completion of the next day’s final PM chart review in accordance with the chart review protocol for all scheduled surgery patients.
* Review each patient's medical history.
* Assign surgery rooms and ASA classification to all scheduled patients.
* Meet with the doctor regarding implant, fracture, pathology, graft, and medically compromised patients. Have those patient’s charts on the doctor's desk for review the night before surgery.
* Confirm that the specialty consent forms, implant inventory, hardware record, and status letter are in the patient chart.
* Confirm that chart notes, referrals, schedules, estimates and consent forms match. Any discrepancy must be reported immediately to the office manager.

**Patient Care**

* Execute patient flow responsibilities.
* Confirm patient room and surgery staff assignment for the day.
* Ensure patient care protocols are executed:
	+ All morning patients are seated and ready for the doctor by their scheduled appointment time. The first patient should be NPO, seated, and ready at 8:00 am.
	+ Accurately take and document all patient vitals on the patient intake, patient vital form, and on the tray set up form posted on the view box.
* Interview patients or relatives for the necessary personal and financial information needed to establish a patient medical record.
* Prepare and present the patient chart to the doctor for treatment.
* Take impressions and pour models as needed. Complete the lab slip and request that the receptionist call the dental laboratory for pick-up, then place a copy of the lab request form in front of the patient chart and document on the login form.
* Inform the receptionist of any patient treatment plans that include premedication, special instructions, PRP, pathology results, or the placing of flippers and/or dentures, implants, or bone grafts. Write up special instructions that reflect the treatment plan’s specific case planning directions, per the doctor.
* Prepare the patient’s treatment plans for simple/surgical extractions. Write procedures on the patient estimate form, initial, and send the estimate to the business staff to quote fees in accordance with the fee quote protocol.
* Execute the anesthesia assisting responsibilities in accordance with the anesthesia assisting protocols.
* Accurately prepare IV bags as authorized and in accordance with patient care protocols. Accurately administer schedule II medications in accordance with the DEA, Board of Dentistry, and the medication and anesthesia protocol, as directed by the doctor.
* Execute surgery photography protocol:
	+ Confirm that photographs are taken for implant, orthognathic, pathology, bone graft, sinus lift, and trauma cases in accordance with photography protocol.
	+ Confirm the camera is in the treatment rooms prior to the seating of the patients.
	+ Take patient photographs preoperative, during the procedure, at procedure closure, and postoperative as instructed by the doctor.
	+ Upload photos to the lab computer folder.
	+ Transfer photos from the lab computer folder to each patient chart/account.
	+ Confirm the camera and flash are turned off at the end of each day.
* Execute patient dismissal protocols in accordance with the patient dismissal policies and under direction of the office manager:
	+ Complete dismissal documentation in accordance with local regulatory body dismissal documentation protocol and in a timely fashion.
	+ Escort patients to the car in accordance with the patient dismissal protocol and office policies and procedures.

**Implant/Bone Graft**

* Execute the implant manager tasks, protocols, and job description.
* Accurately execute implant procedures, passing, case setup, breakdown, inventory, treatment documentation, and paperwork for case management. Inform the sterilization tech of any “special” needs for the day, (i.e., immediate turnaround of instrumentation for another case the same day).
* Be in attendance during implant/bone graft consultations:
	+ Take notes and complete the implant patient checklist.
	+ Present the patient treatment plan to patients as directed by the doctor.
	+ Confirm that the patient makes an appointment with the restorative doctor to review fees and treatment planning prior to their surgery appointment.
	+ Document phone conversations in accordance with the implant documentation protocol. Use the implant form to document case preparation.
	+ When not in attendance during the implant consultation, follow-up on appointments, pull the patient chart, review chart notes, review the case with the doctor, and call the patient to discuss questions or concerns regarding the consultation and decisions to proceed with surgery.
* Call patients one week after their implant consultation to answer any questions and concerns about their treatment plan.
	+ Review the procedure, anesthesia, appointment details, and confirm the patient’s understanding and agreement to make an appointment with the restorative dentist.
	+ Obtain written fee estimates, anesthesia expectations, and treatment completion time frames. Document conversation in the patient chart in accordance with the chart note documentation protocol, including patient decisions to postpone or see the restorative dentist after surgery.
* Confirm that implant patients met with their restorative dentist to review the treatment planning and that they have obtained written restorative fees for the restorative portion of their treatment prior to scheduling their surgery.
	+ Confirm that written referral is received from the restorative dentist for case planning, and document details during patient follow-up and treatment planning phone calls.
	+ Call the restorative dentist and confirm knowledge of patient surgery date.
	+ Confirm completion of restorative dentist appointments, treatment planning, models, flippers, dentures, splints, and reports completed and received in our office for the doctor to review.
	+ Obtain written or verbal confirmation from the restorative dentist that it is OK to proceed with the surgery.
* Account for all inventory with the office manager.
* Call the patients one week prior to surgery to answer questions or concerns about their treatment and refer problem solving to the office manager. Document the conversation and obtain the office manager’s initials in the chart note.
* Arrange special instrumentation and obtain PRP/CT scans, additional lab results, and preparation two weeks prior to surgery.
* Confirm that the patient’s x-ray/lab results have been received and discussed with the patient and the doctor two weeks prior to surgery.
* Keep a log of pathology patient treatment plans and results.

**Hospital Cases/Surgery Center**

Assist the doctor with treatment planning and case preparation of hospital surgeries as directed by the doctor and office manager, and in accordance with the hospital surgery protocol.

**Lab/Surgery room setup**

* Acquire and execute the knowledge and ability to sterilize and set up surgical trays for all scheduled emergency surgeries and procedures.
* Work in conjunction with the sterilization tech regarding the efficiency of instruments needed for days with multiple cases.

**Weekly (Maintenance/Inventory/Supplies)**

* Maintain all surgery supplies and instruments in accordance with inventory protocols.
* Oversee the restocking of supplies and instruments in all treatment rooms and in the laboratory.
* Execute supply purchases and inventory protocols.
* Schedule all necessary equipment maintenance per the doctor’s instructions and as directed by the office manager.
* Document and submit equipment maintenance requests in accordance with the equipment maintenance/purchase protocol.
* Maintain responsibility for logging repair and maintenance on the equipment maintenance log sheet.

**Monthly**

* Execute month end procedures and complete the monthly tasks.
* Inform the office manager of any incomplete tasks, changes, and/or unmet due dates.
* Obtain authorization from the office manager prior to delegating tasks to other employees.
* Review and maintain the surgery staff protocol manual.
* Submit protocols and documents requiring revisions to the office manager.

**Annually**

Perform all annual tasks as outlined on the year end checklists.