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Surgical Assistant   
Procedure Guide

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# INTRODUCTION

This guide is a tool to demonstrate the specifics for your position and the procedures for operation. It breaks down each component of the surgical assistant position and the expectations for performance. For detailed patient scenario scripting examples, please refer to ePractice Manager’s online document library on your company’s portal.

# PART 1: CARING FOR THE PATIENT

When a patient is escorted to the operatory, the surgical assistant should pleasantly explain that the doctor will be coming shortly and help properly prepare the patient for their procedure. Ensure that computer screens and any chart information are kept out of the immediate view of the patient to avoid any unnecessary anxiety for the patient.

Explain to the patient what the doctor will be doing when they arrive. Keep in mind that although dental surgery is a routine process for the dental team, it is not routine for patients. Take the time to explain things to the patient in terms they can easily understand without jargon, and keep them as comfortable as possible. If the patient has to wait until the doctor arrives, ask if they would like a magazine, and recline their chair.

## The Nervous Patient

Many patients experience anxiety and/or nervousness at the dental office. It is our job to alleviate as much of this as we can, both before and during the patient's dental treatment. The nervous dental patient can be difficult to treat. The best environment for treating a nervous patient is one that is quiet and free from external noises and movement.

Use the following guidelines when treating nervous patients:

* Set up the instruments prior to the patient being seated.
* Be calm.
* Treat the patient courteously.
* Limit movement in the operatory.
* Limit all external noises in and around the operatory, including unnecessary talking, clanging of instruments, etc.
* Do not restock trays or tubs during this patient's office visit.
* Do not allow verbal interruptions from other office staff members.
* Reassure the patient as necessary.

The process for reassuring nervous patients begins with the receptionist’s initial phone conversation. During this call, it is usually discovered if the patient is nervous or apprehensive, and we can put steps in motion to help the patient feel as secure and comfortable as possible. Through treatment planning and operative, it is important that all staff members work together to keep the patient relaxed and comfortable.

# PART 2: OPERATORY CHECKLIST

The following steps should be completed during the patient flow when entering the operatory, during treatment, and leaving the operatory.

## Prior to Seating the Patient

* Ensure that the operatory has been cleaned.
* Ensure that the patient's chart is in the operatory.
* Check the patient’s chart for necessary precautions (e.g., allergies or medical alerts).
* Have the appropriate x-rays ready to be viewed.
* Ensure that the appropriate equipment is set up.
* If necessary, review the procedure to be performed with the doctor.

## Taking the Patient to the Operatory

* Greet the patient by name.
* Escort the patient to the operatory.
* Help the patient to get comfortably seated and place the bib.
* Talk with the patient. Find out how the patient has been since their last visit, answer any questions they have, and reinforce the need for preventative care.
* Update the patient's history.
* Inform the doctor that the patient is ready.

## During the Patient's Visit

* Assist the doctor during the procedure.
* Reinforce any post-treatment care the doctor has suggested and provide appropriate handout material.
* Ensure all the patient's questions are answered in terms they can understand.
* Help the patient clean up.
* Route the patient to the front desk for reappointment, if necessary.

## After the Patient Leaves

* Check if the patient left anything behind.
* Ensure that all storage containers have been covered and put back in place.
* Remove all soiled linens and towels and put clean ones out.
* Ensure all disposable items, paper products, dressings, wrappings, syringes, etc. are properly discarded.
* Ensure that all used special instruments and medications are put away.
* Verify that any stains or refuse is cleaned from the floor and/or chair.
* Ensure that the room is free from any offensive odors.
* Ensure that the patient’s chart is updated.
* Set up the operatory for the next patient.

# PART 3: EFFICIENCY AND PRODUCTIVITY GUIDELINES

The surgical assistant’s duties will depend on the doctor’s needs, and the extent of your duties depends largely on state regulations and your past and continuing education.

As a surgical assistant, you are part of a team that helps increase the smooth flow of patients through the operatory by

* working as fast as possible
* helping the doctor to work carefully and efficiently
* being sensitive to what the doctor and patient are doing
* ensuring that patients are calm and comfortable before, during, and after the exam and treatment

## Time Management

The doctor’s time is the most valuable asset of the dental team. The surgical assistant must:

* be very time efficient
* know what to do and when to do it
* know how to function without causing problems or distractions for the doctor
* have a set list of duties for preparing the operatory and patient
* have prioritized daily, weekly, and monthly duty lists

The operatory, equipment, and patient must be completely prepared before the doctor is ready to start the examination. An appointment should *never* be delayed due to a forgotten instrument or material.

If an unexpected issues arises during a visit, the surgical assistant should take care of it or ensure that another staff member does so without disturbing the doctor.

In accordance with state laws, the surgical assistant should learn to take responsibility for the preparation and execution of the treatment. The doctor and surgical assistant can work together to determine which tasks are within the surgical assistant's ability and scope. By watching the doctor work, the surgical assistant can ascertain what is needed during a serious treatment routine and can learn to take on more duties. All expanded duties must be discussed with and approved by the doctor.

## Maximizing Efficiency and Productivity

The primary function of the surgical assistant is to contribute to the doctor’s production, thereby facilitating the increased dollar value of the doctor’s time.

The following guidelines are designed to maximize production:

* Make the doctor’s time efficient by doing as much preparation as you can based on your training and experience. Do the things for which you are trained. Don't wait for the doctor to tell you to do it.
* Keep an eye on the treatment plan for each scheduled patient to help ensure that all possible work gets completed.
* Work closely with each patient by
  + communicating with each of them
  + reinforcing the doctor's instructions for post-treatment care
  + handing off the patient to the patient/financial coordinator to schedule follow-up appointments once the treatment is complete
  + staying alert to any obvious treatment needs the patient has and letting them patient know *without diagnosing*
  + promote the importance of good dental care
  + ensure all patient questions are answered before they leave
* Connect frequently with the receptionist to keep the schedule running on time and let them know if you are running behind schedule.

If these actions occur on a standard, routine basis, patients will feel comfortable and will understand what is going on and why. They will be satisfied with the service, willing to schedule further treatments as needed, and happy to refer family and friends.