

TABLE 2. Process of Care Operatory Chart Model^{4,7}

Assessment Categories	Signs/Symptoms	Dental Hygiene Diagnosis	Relate to:	Dental Hygiene Care Planning
Systemic health Vital signs Medications (prescription/over the counter/ herbals) Assessments Glucose Allergies Skin Nutrition Sleep Xerostomia Risk Other	<ul style="list-style-type: none"> Elevated blood pressure Elevated temperature Irregular respiration Irregular pulse/arrhythmia Anaphylaxis Hypoglycemia Hyperglycemia Overweight/obesity Allergies Shortness of breath Intraoral bleeding Ulcers/lesions Confusion/altered state Other 	Patient-reported systemic disease factors <ul style="list-style-type: none"> Cardiovascular disease Cardiopulmonary obstructive pulmonary disorder Helloma Diabetes/prediabetes Cerebrovascular accident Bleeding disorder Seizure disorder Autoimmune disease Immunocompromised Status Pregnancy Active infectious disease Drug/alcohol addiction Mental health condition Risk for infection Impaired swallowing Risk for emergency Risk for oral cancer Risk for bleeding Impaired physical mobility Risk for unstable glucose levels Unhealthy body image Risk for syncope Risk for heart palpitations Risk for anxiety Risk for recurrence Xerostomia Other 	<ul style="list-style-type: none"> Overweight/obesity Hypertension Allergic response/ Hypersensitivity Previous reaction to local anesthetic Current tobacco use History of tobacco use Prescription medication Over-the-counter medications or supplements Other recreational drug/alcohol use Radiation therapy Eating disorders Sigman syndrome or other autoimmune condition Inadequate access to care Other 	<ul style="list-style-type: none"> Physician referral Referral for further glucose testing beyond chairside testing Referral for further blood pressure evaluation Physician referral for human papilloma vaccination consultation Dietary counseling Registered dietitian referral Oral pathology self-exam Dermatologist referral Sleep apnea referral Alcoholic program referral Smoking cessation counseling and referral Social services referral General/specialty dentist referral Stress reduction protocol Other
Patient's needs/values/ self-care preferences assessment Readiness for health improvement Tobacco cessation Dietary counseling Stress reduction	<ul style="list-style-type: none"> Patient's chief concern Biofilm and calculus present Oral pain Lack of knowledge about oral disease etiology Lack of awareness of oral health prevention Misconception about biofilm Malocclusion 	<ul style="list-style-type: none"> Psychomotor deficits Poor oral self-image Poor oral self-care Knowledge deficit 	<ul style="list-style-type: none"> Oral esthetics Inadequate parental supervision for oral self-care Patient dentistry Patient attitudes Inadequate oral health education Limited value on oral health Lack of interest in oral health Lack of exposure to evidence-based literature 	<ul style="list-style-type: none"> General/specialty dentist referral Orthodontist referral Oral health education Tooth whitening system Oral health education Social services referral Mental health counseling referral
Behavioral health assessment	<ul style="list-style-type: none"> Patient fear expressed Intraoral pain or sensitivity No dental exam within past 2 years Other 	<ul style="list-style-type: none"> Patient anxiety Excessive stress Inadequate oral self-care Impaired physical mobility Caregiver role strain Impaired memory Nonadherence to health-care recommendations Patient reported mental health factors <ul style="list-style-type: none"> Autism Spectrum Dementia Alzheimer's disease Post-traumatic stress disorder Depression Grieving/sorrow Other 	<ul style="list-style-type: none"> Lack of exposure to information Patient concerned about: Infection control Radiation safety Fluoride safety Previous negative experience Misconception about oral product safety and efficacy Cost of care Other 	<ul style="list-style-type: none"> Physician referral Mental health counseling referral Social services referral Stress reduction protocol Nitrous oxide/oxygen analgesia Oral health education Occupational therapist referral Physical therapist referral
Family/social/cultural assessment	<ul style="list-style-type: none"> Communication difficulties due to lack of interpreter Transportation difficulties Patient expressed concerns regarding cost of care Inadequate biofilm control 	<ul style="list-style-type: none"> Family beliefs/hindrance to care Social hindrance to care Cultural beliefs/hindrance to care Potential for injury 	<ul style="list-style-type: none"> Language barrier Inadequate access to care Cultural or religious beliefs prohibit some health care Patient reports: Plays contact sports 	<ul style="list-style-type: none"> Physician referral Social services referral Interpreter Oral health education Sports mouthguard
Mucosal assessment	<ul style="list-style-type: none"> Extraoral/intraoral swelling, lump, growth Erythropakia patch (red) Leukoplakia patch Sore/lesion/ulcer present over 2 weeks 	<ul style="list-style-type: none"> Low oral cancer risk Moderate oral cancer risk High oral cancer risk Extreme oral cancer risk Abnormal oral cancer screening (referral indicated) Oral infections <ul style="list-style-type: none"> Candidiasis Herpes labialis Aphthous stomatitis Pericoronitis Other Risk for recurrence 	Patient reports: <ul style="list-style-type: none"> Sore/lesion/ulcer Difficulty swallowing Lump/swelling/growth Herpes simplex virus Human papillomavirus infection Current tobacco use History of tobacco use Alcohol consumption Antibiotic therapy Chemotherapy Radiation therapy Cobin's disease Corticosteroid use (inhaler) Immunosuppression Dentures Xerostomia Partially erupted tooth Other 	<ul style="list-style-type: none"> Physician referral Oral pathology self-exam Dermatologist referral Oral Surgeon referral Ear-nose-throat physician referral 2 week re-eval appointment
Dental assessment Readiness for dietary counseling • low • moderate • high	<ul style="list-style-type: none"> Teeth with signs of disease Demineralization evident Missing teeth Defective restorations Erosion Attraction Chewing difficulty Intraoral pain or sensitivity Inadequate biofilm control Caries evident on radiographs Inadequate parental supervision for oral self-care Other 	Dental caries risk <ul style="list-style-type: none"> Low caries risk Moderate caries risk High caries risk Extreme caries risk Risk for recurrence Types of caries <ul style="list-style-type: none"> Smooth surface caries Root surface caries Proximal PII and fissure caries Rampant caries Early childhood caries Other 	<ul style="list-style-type: none"> Nutrition and diet Eating disorders Lack of regular dental/ dental hygiene care appointments Inadequate oral self-care behaviors Malocclusion Orthodontic appliances Recession Impaired physical mobility Sigman syndrome Previous radiation to the head and neck Xerostomia Inadequate access to care Other 	<ul style="list-style-type: none"> Oral health education General dentist referral Endodontist referral Orthodontist referral Dietary counseling Registered dietitian referral Social services referral Occupational therapist referral Fluoride varnish application Silver diamine fluoride application (SDF) Salant placement Interim therapeutic restorations (ITR) Traumatic restorative treatment (ART)
Periodontal health, gingival diseases and conditions	<ul style="list-style-type: none"> Oral malodor Gingival inflammation Bright red gingival tissue Soft, spongy tissue Fibric, clotting, festooning, bulbous, rolled, or cratered tissue Bleeding on probing Probing depths 0 mm to 4 mm Intraoral pain or sensitivity Inadequate biofilm management Calculus present Inadequate parental supervision for oral self-care Other 	1. Periodontal Health and Gingival Health <ul style="list-style-type: none"> Gingival health on an intact periodontium Gingival health on reduced periodontium: stable periodontitis patient Gingival health on reduced periodontium: nonperiodontitis patient 2. Gingivitis <ul style="list-style-type: none"> Dental Biofilm-Induced Biofilm only Systemic or local risk factors Drug-influenced gingival enlargement 3. Gingival Diseases <ul style="list-style-type: none"> Non-dental Biofilm-Induced Genetic/developmental Specific infections Inflammatory/immune Reactive processes Neoplasms Endocrine, nutritional, metabolic Traumatic, lesion Gingival pigmentation 	<ul style="list-style-type: none"> Systemic disease Pregnancy Medication (oral contraceptive/anticonvulsive drugs) Malnutrition (ascorbic acid deficiency) Viral, bacterial, or fungal infection Allergic reaction Traumatic lesion Malocclusion Orthodontic appliances Inadequate access to care Inadequate oral self-care behaviors Impaired physical mobility Lack of regular dental/dental hygiene care appointments Other 	<ul style="list-style-type: none"> Oral health education to manage biofilm and inflammation Prophylaxis Full-mouth debridement Dietary counseling Smoking cessation counseling Physician referral Orthodontist referral Social services referral Occupational therapist referral
Periodontal assessment: Forms of periodontitis	<ul style="list-style-type: none"> Oral malodor Bone loss Class I furcation involvement Class II, III, or IV furcation involvement Tooth mobility (Class I, II, III) Probing depths 3 mm to 4 mm/attachment loss 1 mm to 2 mm Probing depths 5 mm to 7 mm/attachment loss 1 mm to 4 mm Probing depths greater than 7 mm/attachment loss over 5 mm Recession Intraoral pain or sensitivity Inadequate biofilm management Calculus present Inadequate self-monitoring of health status Spontaneous gingival bleeding Necrosis of interdental papillae Necrosis of tissue, periodontal ligament, and bone 	1. Necrotizing Periodontal Diseases <ul style="list-style-type: none"> Necrotizing gingivitis Necrotizing periodontitis Necrotizing stomatitis 2. Periodontitis as a Manifestation of Systemic Disease	<ul style="list-style-type: none"> Age Systemic disease History of periodontal disease Malocclusion Occlusal trauma Overheating restoration Use of tobacco Inadequate access to care Inadequate oral self-care behaviors Dental treatment anxiety Lack of regular dental/ dental hygiene care appointments Stress Poor diet Inadequate biofilm and inflammation management Human immunodeficiency virus Immunosuppression medications Other 	<ul style="list-style-type: none"> Oral health education to manage biofilm and inflammation Tobacco cessation, counseling, and referral Periodontal maintenance Non-surgical periodontal therapy Local anesthesia Nitrous oxide/oxygen analgesia Localized delivery of medications Oral irrigation Dietary counseling Registered dietitian referral Physician referral General dentist referral Orthodontist referral Social services referral Occupational therapist referral Re-evaluation Re-care Periodontist referral
Periodontal assessment: Periodontal manifestations of systemic diseases and developmental and acquired conditions	<ul style="list-style-type: none"> Oral malodor Gingival inflammation Attachment loss Bleeding on probing Probing depths over 3 mm Intraoral pain or sensitivity Inadequate biofilm management Calculus present Widened periodontal ligament Other 	1. Systemic diseases/conditions affecting periodontal supporting tissues	<ul style="list-style-type: none"> Evident before age 35 Microbial infection Lack of regular dental/ dental hygiene care appointments Inadequate oral self-care behaviors Inadequate access to care Other 	<ul style="list-style-type: none"> Oral health education to manage biofilm and inflammation Tobacco cessation, counseling, and referral Periodontal Maintenance Non-surgical periodontal therapy Local anesthesia Nitrous oxide/oxygen analgesia Localized delivery of medications Oral irrigation Dietary counseling Registered dietitian referral Physician/specialist referral General dentist referral Orthodontist referral Social services referral Re-evaluation Re-care Periodontist referral
Peri-implant health assessment	<ul style="list-style-type: none"> Gingival inflammation Bleeding on probing Attachment loss Loss of supporting bone Diminished dimension of alveolar process/ridge 	1. Peri-implant health 2. Peri-implant mucositis 3. Peri-implantitis 4. Peri-implant soft and hard tissue deficiencies	<ul style="list-style-type: none"> Residual cement Lack of regular dental/ dental hygiene care appointments Inadequate oral self-care behaviors Previous/continued severe periodontitis Systemic disease Medication Prosthesis pressure 	<ul style="list-style-type: none"> Oral health education Tobacco cessation, counseling, and referral Periodontal Maintenance Non-surgical periodontal therapy Local anesthesia Nitrous oxide/oxygen analgesia Localized delivery of medications Oral irrigation Dietary counseling Registered dietitian referral Physician referral General dentist referral Re-evaluation Re-care Periodontist referral