

**TABLE 2. Process of Care Operatory Chart Model<sup>4,7</sup>**

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