



## Clinic Workflows



Taking time to plan how the Cavity Free At Three Model can fit into clinic workflow will make implementation easier. Staff usually feel more comfortable when roles are clearly defined. In a primary care setting, oral health services take 2-3 minutes.

Many healthcare organizations have their own process on how they map clinic flow, roles and responsibilities or standard work. We recommend:

**Step 1** - Map current workflow if you don't have an existing one documented.

- Limit to 10-12 steps, i.e. high-level overview, don't get lost in the weeds

**Step 2** - Map where Cavity Free at Three services will be implemented into workflow. Ideally this is done as a group with all critical staff who are involved.

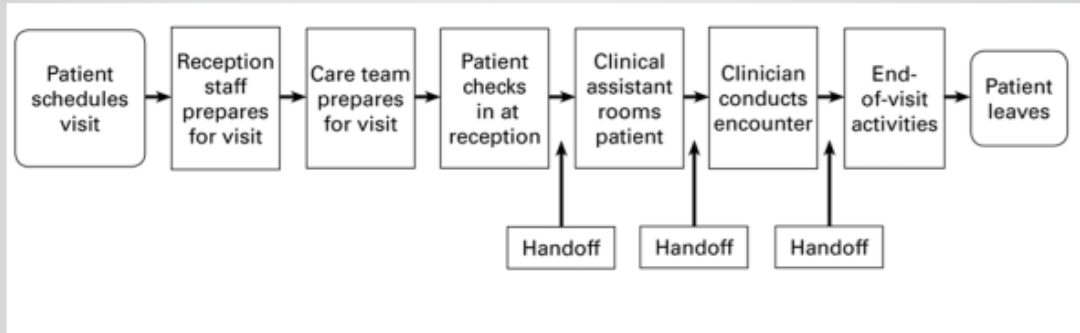
- Specifying who will be responsible for each step added
- Look for potential unintended consequences or alternative workflow options if the first option doesn't work

### Tips:

- Pilot a workflow with one provider/assistant dyad to find out what works and doesn't work before rolling out to the rest of the clinic.
- **Clarify patient population**
  - o Cavity Free at Three training certifies medical providers to see patients up until age 12, but our model focuses on children ages 0-3. Decide and create a clinic policy around which patients should receive oral health services.
  - o Create a system to flag appropriate patients for oral health services
    - Ideally an electronic reminder/tickler in patient chart
  - o Create a plan for how patients with Medicaid, no insurance and private insurance will be billed. If you provide the service to one set of children, you are required to offer it to all insurer types.
- **Clarify consents/paperwork**
  - o Your general medical consent is considered adequate, but some practices prefer notifying clients using a separate consent. Consult your legal department.
  - o Include in consent paperwork if patients with denied private insurance claims will be charged for services.
- **Have Supplies Ready** - See section on Supplies for further details
  - o Order ahead of training
  - o Decide where supplies are stored/quality assurance
- **Delegate responsibilities, clear roles**
  - o The physician must complete the oral health diagnosis
  - o Other duties can be delegated to support staff

Example

# Workflows



Source: [Qualis Implementation Guide Supplement](#), 2016

