Cavity Free at Three Implementation Checklist

It is helpful to have completed this checklist prior to training and implementation. Reach out to us for questions!

WORKFLOW	WHO	DUE DATE	NOTES
☐ Select staff to attend the training *(we recommend everyone is trained)*.			
☐ Choose a site champion for ongoing coaching.			
☐ Flag charts to identify patient eligibility.			
☐ Map clinic flow – Note provider must complete Caries Risk Assessment (CRA) and Oral Health Diagnosis.			
☐ Decide how to document visit and Fluoride Varnish (FV) in EHR (*See Section on EHR*).			
☐ Plan a go-live date. *We recommend immediately after training. However, option to start with one provider, second go-live to spread to others.*			
CLINIC PROCEDURES & POLICIES	WHO	DUE DATE	NOTES
☐ Create a referral list to dental providers. It is helpful to contact local dental providers. *See section on Dental Referrals.*			
☐ Decide to use general consent only or create a FV-specific consent form.			
☐ Determine which patient education materials you will distribute and how. (waiting room, folder, patient instructions, given by MA/Provider)			
☐ Develop office policy stating which patients will receive the services (under 5 years old, up to age 12, etc.)			
☐ Develop office policy stating what to charge (if any) patient with private insurance if insurance denied.			
☐ Develop a plan for onboarding new staff. *See section on Onboarding New Staff.*			
BILLING	WHO	DUE DATE	NOTES
☐ Formalize a billing process.			
☐ Educate billing staff on codes and forms for submission *see Billing Reference Sheets.*			
☐ Enter billing codes in electronic health record and review with providers their role			
☐ Check that claims have been paid			
SUPPLIES AND ORDERING	WHO	DUE DATE	NOTES
☐ Assign who will complete ordering			
☐ Create a tracking system for FV inventory with quality assurance measures			
☐ Order kits or FV alone *Section on Supplies*			
☐ Find storage for kits/FV			