

Perio Intelligence CARE Workflow Implementation Checklist Clinical Adoption & Coaching Guide

Clinic Readiness

- ☐ Team members can successfully log in and access patient records
- ☐ Perio Intelligence Dashboard is visible and functioning
- ☐ Patient Wellness Profile is accessible
- ☐ Treatment Planning module is enabled

C = Chart Review

- ☐ Open Perio Intelligence Dashboard before the appointment
- ☐ Review patient periodontal risk indicators
- ☐ Review systemic and behavioral risk factors
- ☐ Review BOP, pocketing, recession, and attachment loss findings
- ☐ Review hygiene interval recommendations
- ☐ Review outstanding periodontal treatment opportunities

A = Assess

- ☐ Open Patient Wellness Profile
- ☐ Confirm medical history changes
- ☐ Validate Stage, Grade, Extent, and Gingival Status
- ☐ Confirm BOP findings
- ☐ Assess clinical signs of inflammation
- ☐ Confirm diagnosis accuracy

R = Recommend

- ☐ Discuss periodontal risk level

☐ Review areas of concern identified by Perio Intelligence

☐ Confirm hygiene interval

☐ Review treatment recommendations

☐ Build personalized care plan

E = Educate & Enroll

☐ Review key findings using Wellness Profile

☐ Discuss BOP %, pocket depths, recession, and risk factors

☐ Explain treatment benefits and consequences of delaying care

☐ Review home care recommendations

☐ Schedule recommended treatment and/or maintenance visit

☐ Complete documentation