Appendix A: Annotated Oral Health Integration Toolset

Section 2: The Case for Change: Delivering Preventive Oral Health Services in a Primary Care Medical Home

- The Case for Change: Incorporating Oral Health in Routine Medical Care: This modifiable slide deck can be used by a champion in your practice organization to educate and inspire others. It includes basic information on the burden of oral disease and why oral health is an important component of comprehensive care. There are also spaces and directions for customizing messages for your community and audience.

Section 3: The Oral Health Delivery Framework

- Summary of Patient Education Resources: This PDF tool contains links to a variety of patient education materials including handouts, posters, flyers, videos, and websites. The resources are organized by topic, and when available in other languages, the languages are listed.
- Rapid Oral Health Screening and Risk Assessment: This PDF tool is a handout intended for members of the clinical care team. It succinctly summarizes the Framework components, and notes where information can and should be entered into the EHR.
- Summary of Primary Care Oral Health Interventions: This PDF tool is designed for members of the clinical care team. It details the oral health interventions that can be offered in the primary care setting, and provides supporting evidence and references. Links are provided to additional resources that describe coaching techniques that can be applied to oral health topics such as dietary and oral hygiene risk reduction.
- Recommended Oral Health Screening Questions: This PDF handout summarizes the recommended questions a practice can select from to use as the oral health screening and risk assessment questions. Four questions are provided for pediatrics, and six questions are provided for adults and adolescents. A practice may want to use all the questions, or they may select a smaller set, depending on their target population and workflow.

Section 4: Planning for Successful Implementation

- Oral Health Practice Readiness Assessment: This PDF tool walks through the key practice components that are necessary to support oral health integration, and describes conditions that may support full implementation, as well as conditions that may indicate that additional technical assistance may be required to achieve full implementation.
- Sample Oral Health Integration Kickoff Meeting Agenda: This modifiable Word tool presents a draft agenda used by field-testing sites to guide the kickoff meeting for the oral health integration program. The agenda suggests timing and topics for discussion, and includes resources to share with attendees.

These clinical content presentations were designed for the sites field-testing the Framework with the goal of providing the necessary information a primary care practice would need to understand the anatomy and physiology of the mouth, teeth, and gums; the pathophysiology of oral disease; and the actions a primary care team can take to protect and promote oral health. They are designed for a clinical champion to provide to a care team at the beginning of the oral health integration work, and they include two case studies on each topic that can be used to engage a care team and begin the conversation about how the work can be done.

- Clinical Content Presentation and Case Studies: Pregnancy
- Clinical Content Presentation and Case Studies: Diabetes
- Clinical Content Presentation and Case Studies: Pediatrics

- Oral Health Integration Workflow Optimization: A Streamlined Guide for Primary Care Practices: This PDF tool provides a detailed guide to anyone who is planning to conduct a workflow optimization mapping session to integrate oral health into primary care. It reviews the seven key steps in the workflow optimization process, and describes in detail how to execute each step including time commitment, supplies needed, and tools to support the mapping.
- Workflow Optimization for Oral Health Integration: This interactive PowerPoint tool was developed to streamline the traditional workflow redesign process. It allows a practice to walk through the standard steps of a primary care practice visit and determine where to fit in the components of the Framework they plan to implement, and determine who should carry out each component.
- Oral Health Information Technology Assessment: This PDF tool guides a practice through the process of identifying their practice's technical capabilities and organizational willingness to modify their EHR to support oral health integration. Assessing existing barriers is helpful to determine what work-arounds may be needed.

Section 6: Structuring Referrals to Dentistry

- Referral Agreement Template: This modifiable form walks a practice through the content that might be included in a referral agreement. Practices can use the form as a prompt for discussions with referring partners, and remove, modify, or add elements they agree upon. A good practice is for both the primary care practice and dental practice to sign and retain copies of the agreement to refer back to as the referral workflow and processes are worked out.
- Referral Template for Primary Care Referrals to Dentistry: This modifiable Word form provides a template for a primary care practice and dental practice to use to communicate the essential information back and forth. The top half is intended to be filled out by the primary care practice and then sent to the dental practice (via secure email, fax, etc). After the patient is seen, the dentist completes the bottom half and sends it back to the primary care practice's designated contact.
- Sample Completed Referral for Primary Care Referrals to Dentistry: This is a sample completed referral form from a fictional practice to show what the information might look like when completed.
- Oral Health Referral Workflow Optimization: This PowerPoint presentation is designed to be conducted as a 60–90-minute webinar with the primary care and dental staff involved in the referral process. It is based on the overall oral health workflow mapping process, and focuses specifically on the steps involved in making a referral to dentistry, and communicating the results of that referral back to primary care for referral tracking purposes. This "micro" workflow within the larger oral health integration workflow may need some adjusting and refining as referrals start to happen, including regular check-ins between the staff designated as the primary referral contacts.

Section 7: Using Data for Quality Improvement

- Recommended Oral Health Integration Metrics: This PDF tool details the recommended oral health measures used by the oral health integration field-testing sites. The denominators and numerators are defined for each measure. This tool includes the recommended screening questions for adults and pediatrics.
- Oral Health Data Reporting Template and Run Chart: This modifiable Excel tool supports oral health integration data reporting. The first tab provides a description of the recommended measures for adults and pediatrics and instructions for using the tool. The second tab is where a practice can enter the numerators and denominators for the oral health data they are reporting. Subsequent tabs automatically generate run charts to show progress over time.