

CORE GUIDE #3

CLIENT-READY TRAINING MANUAL

# Chairside Orthodontic Assisting Starter Manual

A beginner-friendly manual for supporting the orthodontist, protecting patients, and becoming trusted in the clinical room.

  
**SET UP**

Prepare the room

  
**ASSIST**

Support chairside

  
**RESET**

Keep flow moving

White-label training manual • Customize with your office details



# How to Use This Guide

This white-label guide is designed as a practical training manual. Use it as a learner workbook, onboarding companion, office training reference, or digital product base. Customize it with your office policies, software screenshots, trainer initials, and state-specific requirements before using it as an internal manual.

## Read

Move through one section at a time instead of trying to memorize everything at once.

## Practice

Use the scripts, drills, and checklists until the workflow feels natural.

## Customize

Add office-specific details, provider direction, and local rules before final use.

### SCOPE + SAFETY NOTE

This guide is educational. Follow your office policies, supervising provider direction, state rules, OSHA/CDC guidance, HIPAA privacy requirements, and manufacturer instructions.

## Training Goal

The goal is not to make a new team member sound like an expert on day one. The goal is to help them become organized, safe, coachable, clear, and useful in the role.



# Chairside Orthodontic Assisting Starter Manual

A beginner-friendly manual for supporting the orthodontist, protecting patients, and becoming trusted in the clinical room.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### START HERE

This manual is about becoming useful at the chair. Chairside orthodontic assisting is not about pretending you know everything. It is about learning how the room moves, how the doctor communicates, how patients feel, and how to support the appointment without creating confusion. A new assistant earns trust by being prepared, calm, clean, organized, and coachable. The goal is not to rush into every task. The goal is to become the person the team can rely on because you pay attention and follow the system.

### Trainer Note

The best chairside assistants are not just fast. They are steady. They notice what the doctor needs, what the patient feels, what the room is missing, and what must happen next. How to use this guide

- Read one section at a time before your next shift.
- Use the checklists as conversation starters with your trainer or lead assistant.
- Never perform a clinical task unless you have been trained, assigned, supervised as required, and allowed by your state and office policy.
- Keep a notebook. Write down the appointment type, setup items, patient language, and one thing you learned.

### CORE PROMISE

By the end of this manual, you should understand what chairside assisting means, what to observe, what questions to ask, how to prepare for common orthodontic appointments, and how to become safer and more useful every week.

## This guide

## Chairside Orthodontic Assisting Starter Manual



## FIELD MAP

What you will learn

- The chairside role: what you are really responsible for
- Scope, safety, and why state rules matter
- Operatory setup and the clean-to-dirty mindset
- How to greet, seat, and prepare a patient
- The appointment flow: consults, records, adjustments, bonding, debonding, and retainer checks
- How to assist without getting in the way
- How to communicate with patients, parents, doctors, and teammates
- How to chart clearly and document what matters
- How to build skill over 30 days without rushing the process

## THIS GUIDE IS FOR

### New orthodontic assistants

Dental assistants moving into ortho Sterilization or records team members cross-training chairside Office teams onboarding beginners

## THIS GUIDE IS NOT

A replacement for licensed instruction A state law or scope-of-practice document A clinical procedure manual Permission to perform duties without training

## THE This guide STANDARD

Preparation creates confidence. Confidence creates better patient care. Better patient care creates trust.

## This guide

## Chairside Orthodontic Assisting Starter Manual

## SECTION 1

What chairside assisting really means The chairside assistant supports the orthodontist during patient care. That support includes preparing the treatment room, welcoming and seating the patient, helping the patient feel safe, anticipating the doctor or lead assistant, maintaining infection-control habits, organizing supplies, documenting what happened, and helping the room reset for the next patient. BLS describes dental assistants as workers who help with patient care, take X-rays where allowed, keep records, and schedule appointments. The chairside orthodontic version of the role lives inside that same support lane,



but with an orthodontic focus: braces, aligners, retainers, records, adjustments, patient education, and treatment progress.

## OFFICE REALITY CHECK

Chairside is a rhythm job. You learn by watching the same appointment types repeat until the pattern becomes familiar. At first you will feel slow. That is normal. Slow and safe beats fast and careless. The chairside assistant protects four things

- The patient experience. The patient should feel welcomed, attended to, and not forgotten.
- The clinical flow. The room should have what the appointment needs before the doctor arrives.
- The safety system. Clean instruments, PPE, hand hygiene, surface disinfection, and proper turnover matter every time.
- The office record. Notes, instructions, next steps, and patient concerns should be communicated clearly.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 2

Scope, safety, and the beginner rule A new assistant must understand one truth early: dental and orthodontic duties are regulated differently from state to state. Some offices may train entry-level assistants on the job, while other duties may require certification, registration, a permit, radiology training, expanded-function approval, or direct supervision. DANB provides state-by-state requirement resources that explain job titles, exam and education pathways, allowable duties, and state rules. Before a new hire performs clinical tasks, the office should make sure that the assistant is trained and working within the rules for that state.

## THE BEGINNER RULE

If you have not been trained, cleared, and assigned to do it, do not do it. Ask, watch, and learn first. What you can safely focus on as a beginner [ ] Learning room names, drawer locations, and supply systems [ ] Watching appointment setup and cleanup patterns [ ] Practicing patient language and professional tone [ ] Learning infection-control flow from clean to dirty [ ] Writing down appointment types and questions [ ] Observing how the doctor gives instructions and how assistants respond Ask before you assume

- What am I allowed to do in this state and in this office?
- What requires certification, permit, radiology approval, or direct supervision?
- What do you want me to only observe for now?

## This guide



## Chairside Orthodontic Assisting Starter Manual

### SECTION 3

The operatory map: learn the room before the procedure The treatment room is the assistant's workspace. Before you can be useful during an appointment, you need to know where supplies live, how the room should look when it is ready, what belongs on the tray, where clean items stay, where dirty items go, and what must never be touched with contaminated gloves. CDC infection-prevention guidance explains that dental settings rely on Standard Precautions and that instruments, devices, and equipment must be reprocessed correctly and in the proper sequence every time. That means room awareness is not just about efficiency. It is part of patient safety.

### Trainer Note

Do not learn the room randomly. Learn it in zones: patient zone, assistant zone, doctor zone, clean supply zone, dirty instrument zone, charting zone, and trash/sharps zone. Room zones to memorize

### CLINICAL ZONES

Patient chair and light Doctor side and assistant side Tray or bracket table Suction and air/water area

### Instrument transfer area

### SAFETY ZONES

### Hand hygiene/PPE station

### Clean supply drawers

Dirty instrument holding area

### Surface barrier locations

Trash and sharps disposal

### Daily learning mission

- Ask your trainer to walk you through the room and explain what should be touched with clean hands only.
- Draw a quick room map in your notebook after the shift.

### This guide

## Chairside Orthodontic Assisting Starter Manual



## SECTION 4

Setup is where chairside confidence starts. A prepared room lowers stress for the doctor, the assistant, and the patient. Setup means more than placing tools on a tray. It means knowing the appointment type, reviewing the schedule, checking what the patient is coming in for, confirming needed supplies, and leaving the room clean, organized, and ready.

### OFFICE REALITY CHECK

If the room is missing something, the appointment slows down. If the room is cluttered, the assistant gets distracted. If the assistant does not know the appointment type, the doctor has to carry more of the mental load.

#### Pre-appointment setup checklist

[ ] Review the appointment type before seating the patient. [ ] Confirm which chair or bay the patient is assigned to. [ ] Check that surfaces are clean and barriers are placed according to office protocol. [ ] Gather only the supplies needed for that appointment type. [ ] Confirm suction, light, chair movement, and any equipment you have been trained to check. [ ] Keep clean items clean. Do not cross-contaminate drawers, handles, or charts. [ ] Make sure the patient area feels calm and uncluttered.

#### The beginner question

### ASK THIS BEFORE THE PATIENT ARRIVES

What is the goal of this appointment, and what should I have ready before the doctor comes in?

#### This guide

### Chairside Orthodontic Assisting Starter Manual

## SECTION 5

Greet, seat, and settle the patient. The chairside experience starts before the doctor walks in. A patient may be nervous, tired, rushed, excited, or unsure what is happening. The assistant sets the tone by greeting the patient clearly, guiding them to the chair, explaining simple next steps, and keeping them attended. The ADA sample dental assistant job description includes greeting patients, monitoring arrival time, setting up treatment rooms, escorting patients, seating them, helping them feel comfortable, and anticipating the dentist's needs. Those same habits matter in orthodontics.

#### Simple seating flow

- Greet the patient by name if office policy allows.
- Walk them to the correct chair or bay.



- Confirm the appointment in plain language.
- Ask a simple comfort or concern question.
- Keep them informed if they are waiting.
- Tell the doctor or lead assistant anything important the patient shared.

## PATIENT LANGUAGE

*"Good morning, I am going to get you seated and ready for your visit today."*

### This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 6

Chairside communication: calm, short, useful The room can move quickly. Good communication prevents confusion. Your words should be calm, short, and useful. You do not need to over-explain. You do need to make the patient feel informed and make sure the doctor or lead assistant hears important details.

### WITH PATIENTS

Use warm greetings. Explain what they can expect next. Avoid promising clinical outcomes. Tell them when you need to ask the doctor. Keep your tone calm even when the day is busy.

### WITH THE TEAM

Report concerns before the doctor begins. Repeat instructions if you are unsure. Ask one clear question at a time. Confirm what should be charted. Do not hide mistakes or confusion. Use this when you do not know the answer

### PROFESSIONAL ANSWER

*"That is a great question. I want to make sure I give you the correct answer, so I am going to check with the doctor or lead assistant." Use this when you need clarification*

### CLARIFYING ANSWER

*"To make sure I understood, you want me to prepare the room for \_\_\_\_, then let you know when the patient is seated. Is that correct?"*

### Trainer Note

Beginners lose trust when they act confident while guessing. Beginners gain trust when they ask clean questions and follow through.





## **This guide**

# **Chairside Orthodontic Assisting Starter Manual**

## **SECTION 7**

Learn instruments and supplies by families A new assistant may feel overwhelmed by the number of instruments, materials, and supplies. Do not try to memorize everything in one day. Start by grouping items by purpose. Once you understand what a family of tools is used for, the names become easier to learn.

## **BEGINNER STRATEGY**

Ask your trainer to teach you the "why" before the name. "What is this used for? When do we need it? Where does it live? How is it cleaned or disposed of?"

## **Common learning families**

## **CLINICAL SUPPLIES**

### **Patient protection items**

Cotton, gauze, suction tips, and isolation items Mirror/explorer-style exam items as applicable Orthodontic pliers and hand instruments Elastics, ties, chains, wires, brackets, bands, and retainers

## **ADMINISTRATIVE FLOW**

### **Chart note templates**

### **Appointment codes**

### **Next appointment notes**

### **Patient instruction sheets**

### **Supply restock lists**

### **The 3-question method**

- What is it called?
- When do we use it?
- Where does it go after use?



If you ask those three questions consistently, your memory will build faster than if you only stare at a tray trying to remember names.

## This guide

# Chairside Orthodontic Assisting Starter Manual

## SECTION 8

The appointment types you need to recognize Orthodontic offices run on repeatable appointment types. Every practice has its own names and workflow, but most new assistants should learn the basic purpose of each visit. Your job is not to master the whole procedure immediately. Your job is to recognize the goal, setup pattern, patient concerns, and next-step language.

### Core appointment categories

- Consultation: a new or returning patient is evaluated and treatment options may be discussed.
- Records: photos, scans, X-rays where allowed, impressions if used, and information needed for planning.
- Adjustment: a routine visit to check progress and make treatment changes.
- Bonding/start: the beginning of braces or appliance treatment, performed according to office procedure and doctor direction.
- Debond/removal: the braces-removal phase and transition into retention.
- Retainer check: a visit focused on fit, wear, patient compliance, and follow-up instructions.
- Emergency/repair: discomfort, poking wire, loose bracket, broken appliance, or another concern requiring evaluation.

## OFFICE REALITY CHECK

When you understand the appointment type, you can anticipate the room. When you do not understand the appointment type, you should ask before the patient is seated.

## This guide

# Chairside Orthodontic Assisting Starter Manual

## SECTION 9

Consults and records: the first impression matters Consults and records are often the patient's first deeper interaction with the clinical team. The patient may be excited, nervous, or unsure what orthodontic treatment involves. The assistant should help the patient feel guided, not rushed. Records may involve



photos, digital scans, X-rays where allowed by law and office policy, impressions if still used, and accurate patient information. Beginners should not perform restricted tasks without proper training and authorization. Even while observing, a new assistant can learn patient positioning language, room flow, privacy habits, and documentation expectations. What to observe during consults/records [ ] How the patient is greeted and introduced to the appointment. [ ] How clinical photos or records are explained before they happen. [ ] How the assistant protects patient comfort and privacy. [ ] How the doctor or treatment coordinator explains next steps. [ ] What gets documented after the appointment.

## PATIENT SCRIPT

*"Today we are going to gather information the doctor uses to understand your smile and your bite. I will explain each step before we do it."*

## Trainer Note

Records are not just pictures or scans. They are part of the patient story. Accuracy and calm communication matter.

## This guide

## Chairside Orthodontic Assisting Starter Manual

## SECTION 10

Adjustment visits: learn the rhythm of routine care Adjustment visits are one of the best places for new assistants to learn because they repeat often. The patient comes in, the team checks comfort and concerns, treatment progress is reviewed, the doctor gives instructions, the assistant supports the flow, and the next appointment is planned. Each office has its own adjustment setup. Some visits may involve wire changes, elastic instructions, appliance checks, aligner progress, oral hygiene review, comfort concerns, or repair needs. Your role as a beginner is to recognize patterns and ask what each setup is for. Adjustment visit observation checklist [ ] Ask whether the patient has discomfort, poking, broken brackets, loose appliances, or elastic questions. [ ] Watch how the assistant prepares the tray for the specific appointment type. [ ] Listen for the doctor's instruction words and how the assistant responds. [ ] Notice what gets thrown away, cleaned, sterilized, or restocked afterward. [ ] Learn the patient instructions that are repeated often.

Stay focused on the doctor's instructions. Keep the patient informed. Ask before touching supplies you are unsure about. Write down new terms after the appointment.

## DO NOT

Guess at clinical decisions. Ignore patient discomfort. Leave the patient unattended without direction. Act irritated when corrected.



## This guide

# Chairside Orthodontic Assisting Starter Manual

## SECTION 11

Bonding and start appointments: slow down and respect the setup A bonding or start appointment can be exciting for the patient and busy for the team. This is where a patient may receive braces, attachments, appliances, or another treatment start depending on the office and treatment plan. Beginners should treat this as a high-focus appointment type. This manual does not teach clinical bonding technique. That must come from proper training, office protocol, state rules, and doctor supervision. What this guide teaches is how a beginner should approach the appointment: understand the goal, prepare carefully, avoid contamination, listen closely, and learn the sequence without rushing.

## BEGINNER FOCUS

Your first goal during start appointments is not speed. It is understanding what clean setup looks like, how the team communicates, and how patient instructions are delivered after treatment begins. What to learn during bonding/start appointments [ ] What the room looks like before the patient is seated. [ ] Which supplies are opened only when needed. [ ] What must stay clean or isolated according to office protocol. [ ] How the doctor gives instructions during the appointment. [ ] How the assistant explains soreness, hygiene, food rules, elastics, wax, or emergency contact steps if those are part of office instructions. [ ] What next appointment is usually scheduled.

## This guide

# Chairside Orthodontic Assisting Starter Manual

## SECTION 12

Debond and retention: help the patient finish strong Debond or removal appointments can feel like a celebration. Patients are often excited to see their smile. But the work is not finished when braces come off. Retention is the phase that helps protect the result. A chairside assistant needs to understand the emotional tone and the practical importance of instructions. As a beginner, focus on the patient experience, the room flow, the documentation, and the retention instructions used by the office. Do not invent instructions. Learn the exact language your office wants patients to hear. Retention instruction themes to listen for [ ] How often the retainer should be worn according to the doctor's plan. [ ] How to clean and store the retainer according to office instructions. [ ] What to do if it is lost, broken, tight, loose, or uncomfortable. [ ] Why follow-up visits matter. [ ] What the patient should avoid doing with the retainer.

## PATIENT SCRIPT



*"Your smile looks great. The retainer instructions are important because retention is how we help protect the work you and the team just completed."*

## Trainer Note

A good assistant celebrates with the patient, then helps them understand the responsibility that comes next.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 13

Repairs and discomfort: keep the patient calm Orthodontic offices often receive calls or visits for poking wires, loose brackets, broken appliances, lost retainers, sore spots, aligner concerns, or other discomfort. Some issues are urgent. Some are not. The assistant should not diagnose overconfidence into the situation. The assistant should gather clear information and route the concern according to office protocol. Beginners should learn how the office triages repair calls and in-office concerns. The key is calm communication, accurate notes, and a clean handoff to the doctor, lead assistant, or front desk.

## Information to gather

[ ] What is bothering the patient? [ ] When did it start? [ ] Is anything loose, broken, poking, painful, swollen, or preventing eating/sleeping? [ ] Is the patient currently in braces, aligners, appliance therapy, or retention? [ ] What has the patient already tried? [ ] What does office protocol say the next step should be?

## SAFE LANGUAGE

*"I am going to gather a few details and check with the clinical team so we can guide you correctly."*

## DO NOT SAY THIS

Avoid saying "that is no big deal" or "you do not need to come in" unless the office protocol and clinical team specifically direct that response.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 14

Assisting without getting in the way Good chairside assisting is quiet teamwork. The doctor should not have to fight the room, the tray, the light, the suction, the assistant's hands, or the patient's confusion.



Your job is to support the flow, not crowd it. Four-handed dentistry and orthodontic assisting habits are learned through demonstration and repetition. As a beginner, start by learning where to stand, where not to stand, when to move, how to pass items safely according to office style, and how to keep your eyes on what matters.

## Chairside awareness checklist

[ ] Stay where your trainer tells you to stand or sit. [ ] Keep your hands organized and out of the doctor's way. [ ] Watch the doctor's hand movements and verbal cues. [ ] Do not reach across the field unless trained and directed. [ ] Protect the patient from feeling crowded or ignored. [ ] If you are unsure, pause and ask quietly.

## GOOD ASSISTANT ENERGY

**Calm**

**Prepared**

**Alert**

**Clean**

**Patient-aware**

**Correctable**

## NOT HELPFUL

**Rushing**

**Guessing**

Standing in the way

**Talking over instructions**

Touching clean items with contaminated gloves

**Taking correction personally**

**This guide**



## Chairside Orthodontic Assisting Starter Manual

### SECTION 15

**Infection control: clean habits create trust** Infection control is one of the first areas where a beginner can build trust. CDC guidance says Standard Precautions are designed to protect dental health care personnel and prevent the spread of infections among patients. OSHA also identifies dental workplace hazards such as bloodborne pathogens, chemical agents, ergonomics, and other risks. This means a chairside assistant must learn PPE, hand hygiene, surface barriers, disinfection, instrument handling, sharps safety, and room turnover exactly the way the office teaches it. Do not freelance infection control.

#### Clean-to-dirty reminders

[ ] Clean hands touch clean supplies. [ ] Contaminated gloves do not go into clean drawers. [ ] Used instruments follow the office's transport and reprocessing flow. [ ] Surfaces are cleaned and disinfected according to office protocol and product instructions. [ ] PPE is worn and removed correctly according to office training. [ ] When in doubt, ask before touching.

### OFFICE REALITY CHECK

A new hire who protects clean areas becomes trusted faster. Cross-contamination mistakes make the whole team nervous. Slow down and learn the system.

#### This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 16

**Charting and documentation basics** The patient chart tells the story of the visit. It helps the team know what happened, what was discussed, what the patient reported, what instructions were given, and what should happen next. Beginners may not chart independently right away, but they should learn what the office expects. Documentation rules vary by office, software, provider preference, and state requirements. Your job is to learn the exact system and avoid vague notes. If something was said, done, changed, declined, or scheduled, ask how it should be documented. What to listen for [ ] Patient concerns or complaints. [ ] Doctor instructions or treatment changes. [ ] Appliance, wire, aligner, retainer, or elastic instructions. [ ] Oral hygiene coaching and patient response. [ ] Parent or guardian questions. [ ] Next appointment type and timing. [ ] Any follow-up task for the team.

### CHARTING QUESTION

*"How would you like me to document this in the patient chart?"*



## Trainer Note

If it matters to the next visit, it probably matters to the chart.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 17

Patient education: simple, repeated, office-approved Orthodontic patients need instructions. They may need to know how to care for braces, aligners, elastics, retainers, wax, appliances, hygiene, foods, soreness, or next steps. The assistant should not create random advice. Use the office's approved language, handouts, and doctor instructions. Good patient education is clear, short, and repeated. It checks for understanding without making the patient feel embarrassed.

## Teach-back language

### TRY THIS

*"Just so I know I explained it clearly, can you show me how you will use this at home?" Instruction habits that help [ ] Give one instruction at a time. [ ] Use simple words before technical words. [ ] Demonstrate only what you are trained and allowed to demonstrate. [ ] Ask the patient or parent what questions they have. [ ] Provide handouts or digital instructions if the office uses them. [ ] Document instructions according to office protocol.*

### INSTEAD OF

*"You have to be compliant." "Do not break anything." "You should know this."*

### SAY

*"Here is what helps treatment stay on track." "These are the foods or habits that can cause problems."  
"Let me explain it again in a simpler way."*

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 18

Working with kids, parents, and nervous patients Orthodontic offices often care for children, teens, and adults. Every patient brings a different personality. Some are excited. Some are anxious. Some parents ask many questions. Some patients shut down when they feel embarrassed. The assistant helps keep the room





steady.

## OFFICE REALITY CHECK

Patients may not remember every technical thing you said, but they will remember how you made them feel in the chair.

## Calming language

### USE THESE

*"You are doing great. I will tell you what is happening before we do the next step."*

## Parent handoff basics

[ ] Do not share private details outside office policy. [ ] Keep the explanation respectful and simple. [ ] Do not contradict the doctor or treatment coordinator. [ ] When questions become clinical or financial, route them to the right person. [ ] Make sure the parent knows the next step if office policy requires it.

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 19

Common beginner mistakes and how to recover Mistakes happen during training. What matters is how quickly you communicate, correct, and learn. A beginner who hides confusion is risky. A beginner who asks for help becomes safer.

## Mistake

### Better response

Pretending to know an instrument Ask: "Can you show me what that looks like and where it is kept?"

Touching clean drawers with contaminated gloves Stop, tell the trainer, and follow the office correction process.

### Forgetting patient concern

Write it down immediately and communicate it before the doctor begins.

### Taking correction personally



Say: "Thank you. I will fix that." Then actually change the habit. Standing in the way Ask where your trainer wants you positioned for that appointment type.

## Over-explaining to patients

Use approved office language and route clinical questions to the doctor.

## RECOVERY SENTENCE

*"I misunderstood that step. Thank you for correcting me. Can I repeat back the right way so I remember it?"*

## This guide

## Chairside Orthodontic Assisting Starter Manual

### SECTION 20

30-day chairside growth plan This plan helps a new assistant grow without rushing beyond safety or scope. Bring this page to your trainer and ask what should be adjusted for your office.

## Week 1: Observe and map the flow

☐ Learn chair locations and room zones. ☐ Shadow multiple appointment types. ☐ Write down common terms and setup differences. ☐ Practice greeting and seating language.

## Week 2: Assist with supervised basics

☐ Help prepare rooms under direction. ☐ Identify common supplies and where they live. ☐ Practice clean-to-dirty habits. ☐ Ask how notes are documented.

## Week 3: Anticipate routine appointments

☐ Recognize common adjustment visit patterns. ☐ Prepare simple setups with trainer review. ☐ Communicate patient concerns clearly. ☐ Ask for one correction goal each day.

## Week 4: Build trust and consistency

☐ Handle more flow tasks within scope and supervision. ☐ Improve patient language. ☐ Reset rooms safely and efficiently. ☐ Ask what skills are next for your role.

## This guide

## Chairside Orthodontic Assisting Starter Manual



## SECTION 21

Daily and weekly chairside checklist Use this checklist as a training companion. It is not a replacement for office policy. It is a way to keep your learning organized.

### DAILY BEFORE PATIENTS

☐ Review the schedule. ☐ Identify appointment types. ☐ Ask which room you are assigned to. ☐ Check what you are observing vs. doing. ☐ Confirm setup questions early.

### DAILY DURING CARE

☐ Greet patients clearly. ☐ Listen for concerns. ☐ Stay in your assigned position. ☐ Ask before guessing. ☐ Communicate important details.

### DAILY AFTER PATIENTS

☐ Follow turnover protocol. ☐ Return supplies properly. ☐ Ask what should be charted. ☐ Note one new skill. ☐ Note one correction.

### WEEKLY REFLECTION

☐ What appointment type feels clearer? ☐ What still confuses me? ☐ What safety habit improved? ☐ What feedback did I receive? ☐ What should I study next?

### Trainer Note

A trusted assistant does not just get through the day. They review the day and come back better tomorrow.

### This guide

## Chairside Orthodontic Assisting Starter Manual

## SECTION 22

### Copy-and-use chairside scripts

These scripts help beginners sound professional while staying in their lane. Adjust them to match the office voice.

### GREETING

*"Hi, I am going to bring you back and get you ready for today's appointment."*



## COMFORT CHECK

*"Before we begin, is anything poking, loose, sore, or bothering you today?"*

## NEED TO ASK

*"I want to make sure I answer that correctly, so I am going to check with the doctor."*

## LEARNING WITHOUT OVERSHARING

*"I am training with the team today, so I may double-check a few things to make sure everything is done correctly."*

## CORRECTION RESPONSE

*"Thank you for showing me. I will do it that way next time."*

## PARENT UPDATE HANDOFF

*"The doctor will explain the clinical details, but I can let the team know what questions you have."*

## This guide

## Chairside Orthodontic Assisting Starter Manual

## NEXT STEP

*"We are going to get your next appointment scheduled so we can keep treatment moving."*

## This guide

## Chairside Orthodontic Assisting Starter Manual

## SECTION 23

## Chairside readiness checklist

You are not ready because you know every word. You are ready for more responsibility when you show safe habits repeatedly. Ask your trainer to review these with you [ ] I can explain the purpose of common appointment types in simple language. [ ] I know the room zones and where supplies belong. [ ] I understand what I am allowed to do and what I must only observe. [ ] I follow PPE, hand hygiene, clean-to-dirty flow, and turnover protocols. [ ] I can greet, seat, and comfort a patient professionally. [ ] I can communicate patient concerns to the clinical team. [ ] I ask questions instead of guessing. [ ] I respond to correction without attitude. [ ] I know how to document or ask how to document appointment details. [ ]



I know what skills I should work on next.

## FINAL This guide REMINDER

Your goal is not to look experienced before you are experienced. Your goal is to become teachable, safe, useful, and trusted. That is how a beginner becomes part of the team.

### This guide

## Chairside Orthodontic Assisting Starter Manual

### SOURCE NOTES

Sources, safety notes, and educational disclaimer This guide is an educational career and onboarding resource. It is not a state scope-of-practice document, clinical procedure manual, infection-control policy, OSHA program, legal guide, or substitute for employer training. Dental and orthodontic teams should always follow state law, employer policy, doctor direction, manufacturer instructions, and required safety training. Source anchors used to shape this guide

- U.S. Bureau of Labor Statistics, Dental Assistants: occupational duties and job outlook.
- DANB, State Dental Assisting Requirements: state-specific job titles, education/exam pathways, and allowable duties.
- American Dental Association sample dental assistant job description: patient management, room setup, seating patients, comfort, and anticipating dentist needs.
- CDC Dental Infection Prevention: Standard Precautions, instrument reprocessing, sterilization, disinfection, and dental setting checklists.
- OSHA Dentistry overview and enforcement materials: bloodborne pathogens, PPE, chemical, ergonomic, and other workplace hazards.
- American Association of Orthodontists career resources: orthodontic practices post clinical and non-clinical roles such as orthodontic assistant and office manager.

### Important use note

Because dental assisting requirements and allowable duties vary by location, every reader should confirm requirements with their state dental board, DANB state resources, employer, and supervising doctor



before performing any clinical task.

## **This guide CLOSING**

This guide gives the beginner a map. The office gives the training. The law defines the scope. The assistant brings the attitude, the notebook, and the willingness to grow.



# White-Label Customization Checklist

Before selling, distributing, or using this guide inside an office, personalize it so the training feels like it belongs to the client or practice.

- ✓ Add the office name or client brand to the cover if desired.
- ✓ Insert screenshots of the actual software, portals, forms, or scheduling system used by the office.
- ✓ Add state-specific requirements and role limitations.
- ✓ Add provider preferences, office policies, and escalation rules.
- ✓ Add trainer signature lines or staff initials where sign-off is required.
- ✓ Review all privacy, safety, and scope sections before distribution.
- ✓ Export a clean PDF copy for the learner and a separate editable master for the trainer.

## CLIENT-READY REMINDER

Keep the base guide brand-neutral. Let the buyer add their own logo, tone, screenshots, and office-specific workflow so the product feels custom.