Make Your Morning Huddle More Effective: AI + Practice Management

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July 2024
Disclosures:

Dr. Ghorbani is full-time employee of Overjet.
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Senior Clinical Manager, Overjet

- Practice Applications
- Academic Collaborations
- ML Model Creation

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Fun Fact: I have cooked with Martha Stewart!
Learning Objectives

1. Identify the purpose of morning huddles in a dental practice
2. Evaluate how to optimize workflow and efficiency
What is a morning huddle and why have one?

A morning huddle is an efficient and effective way to start the day with the team, about 15 to 20 minutes.

- Review the day before and highlight items that will need follow up
- Discuss the day’s procedures and changes to staff or patient schedule
- Future needs how to prepare for the day after today or if there are openings in the schedule

It’s important to prepare for the day, knowing the plan and what needs might show up. It’s a quick moment that can be used to boost team morale and be a point of collaboration.
The Standard Practice Schedule View

Image Credit, Curve Dental: https://www.curvedental.com/blog/scheduling-essentials-for-dental-practices
### Potential Periodontal Condition

**Recommendations**

<table>
<thead>
<tr>
<th>Appt.Time</th>
<th>Next Appt</th>
<th>Patient Name</th>
<th>Age</th>
<th>Provider</th>
<th>Today's Tx</th>
<th>Operatory</th>
<th>Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 AM</td>
<td>05/01/2024</td>
<td>25642</td>
<td>76</td>
<td>AB</td>
<td>SEATC</td>
<td>Dr Non Production</td>
<td>NOT TREATMENT PLANNED</td>
</tr>
<tr>
<td>10:00 AM</td>
<td>03/14/2024</td>
<td>25746</td>
<td>60</td>
<td>AB</td>
<td>D0220 D0140</td>
<td>Dr Minor</td>
<td></td>
</tr>
<tr>
<td>10:00 AM</td>
<td>06/05/2024</td>
<td>24333</td>
<td>76</td>
<td>AB</td>
<td>D2740 D2950</td>
<td>Dr Major</td>
<td></td>
</tr>
</tbody>
</table>

**Findings**

- Scaling and Root Planing - LL, LR
- 2 Surface Restoration - Interproximal Caries - #6, 10
- Review - PARL - #7
- 2 Surface Restoration - Interproximal Caries - #4, 18
- Restoration - Recurrent Caries - #3, 20
- Review - PARL - #7, 9
- Scaling and Root Planing - LR
- Possible SRP - UR
- Crown - DMF > 50% - #9
- Crown - Recurrent Caries - #19
Morning Huddle to Chart Audits

**Morning Huddle**
- Review BW and Perio Charts Due
- Review SRP opportunities
- Review DMF % +50
- Review PARL

**Patient Visit**
- Update Radiographs and Perio Chart
- Use Overjet to determine bone levels
- Identify areas for potential SRP/Arestin
- Use Overjet to find Decay & DMF%
- Educate patients and parents using AI
- Make notes for BA- Insurance Submissions

**Chart Audits**
- Go to the next calendar day
- Filter Page and Print
- Use Overjet findings to prep charts
- Use Restorative and Perio Page to Fill Schedule
# Morning Huddle By Role + AI

<table>
<thead>
<tr>
<th>Morning Huddle</th>
<th>Doctors</th>
<th>Hygienists</th>
<th>Assistants</th>
<th>Business Assistants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate:</td>
<td></td>
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<tr>
<td></td>
<td>Any followups needed for AI findings (additional radiographs, treatment, etc)</td>
<td>Pts likely needing SRP so BAs can start financial arrangements</td>
<td>AI findings in the same quadrant being treated for doctor review and BA financial arrangement prep</td>
<td>Prepare financial arrangements as directed by clinical team</td>
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<td></td>
<td></td>
<td>Note all &quot;Miscoded Perio Maintenance&quot; patients to ensure correct recall cycle</td>
</tr>
</tbody>
</table>


Thank you!

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