



Consortium for Oral Health Systems  
Integration and Improvement  
ASTDD | DQA | OHRC

## **Integrating Oral Health Care and Primary Care Learning Collaborative A State and Local Partnership**

### **Integrating Oral Health Evaluation into Prenatal Care: Considerations and Examples**

#### **Overview**

The oral health evaluation is composed of subjective and objective findings based on completion of an oral health history, a risk assessment, and a clinical oral screening. Competencies for primary care providers include identifying and prioritizing strategies to prevent or mitigate risk impact for oral and systemic diseases and stratifying interventions in accordance with the evaluation findings.<sup>1</sup>

This document presents key considerations for integrating oral health evaluation into prenatal care. It also includes summaries of how prenatal clinics integrate oral health evaluation and links to examples from the Integrating Oral Health Care and Primary Care Learning Collaborative: A State and Local Partnership (Integration LC) project.

#### **Completing an Oral Health Evaluation**

Using a systematic approach, primary care providers should check the face and lips, gingiva, teeth, soft and hard palate, lateral borders and undersurface of the tongue, posterior pharynx, and floor of the mouth. They should also palpate the neck, temporomandibular joint, and floor of the mouth.<sup>2</sup>

Findings from the oral health evaluation should be documented in the patient's electronic medical record (EMR) and used in combination with oral health risk assessment findings to determine the need for oral health preventive interventions, education, and referral to a dental provider.

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<sup>1</sup> Health Resources and Services Administration. 2014. *Integration of Oral Health and Primary Care Practice*. Rockville, MD: Health Resources and Services Administration.

<sup>2</sup> Clark M, ed. 2018–2022. *Smiles for Life: A National Oral Health Curriculum* (4th ed.). Leawood, KS: Society of Teachers of Family Medicine.

## **Integrating Oral Health Evaluation into the Electronic Medical Record**

Oral health evaluation findings should be documented in an EMR template with other obstetric (OB) findings. This portion of the record may be called the prenatal flow sheet, OB template, or prenatal detail. An oral health evaluation template may need to be created or imported from another part of the EMR, such as the mouth physical exam or children’s oral health evaluation, to the area in the EMR where OB findings are documented.

It is important to ensure that the oral health evaluation findings are documented in a way that can be retrieved from the EMR by generating a report. Examples include:

- **Using structured fields in the prenatal flow sheet.** When the structured field is checked for each clinical finding question, then the final field box defaults to show that an evaluation was completed. Data from that field can then be exported into a report.
- **Using dot phrases in the patient note.** A dot phrase is a preformed block of text that is inserted into the patient note using a keyboard shortcut that is preceded by a period (dot). Reports can be generated from the template note.
- **Using a “dummy” code in the patient record.** A “dummy” code is used for internal tracking purposes instead of for billing. An alphanumeric code is assigned that is either self-explanatory or explained in the description field. Care should be taken to avoid using an actual CPT or ICD-10 code.

### **Documentation Examples (see [Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record](#))**

From the Integration LC

- Document using dot phrases in the patient record (Epic, La Clinica de la Raza, Concord, CA)
- Document completion of evaluation into structured fields in the prenatal flow sheet (eClinicalWorks, Albany Area Primary Care, Albany, GA)
- Document into structured fields in the dental template in the physical exam (Athena, PCC Community Wellness, Chicago, IL)
- Use a paper form that is scanned into the patient record (AthenaOne, Choptank Community Health, Cambridge, MD)
- Use a paper form to document using the “dental urgency” score listed at the bottom of the paper oral health risk assessment (NextGen, G.A. Carmichael, Canton, MS)
- Document completion of evaluation in the dental care tab in the initial OB template (NextGen, Lorain County Health and Dentistry, Lorain, OH)
- Document in the mouth physical exam template embedded into the prenatal detail portion of the record (NextGen, Comprehensive Community Action Program, Cranston, RI)

- Document into structured fields in the physical exam portion of the patient record (Open EMR, Community Health Network, Houston, TX)
- Use a paper form for prenatal oral health screening, risk assessment, and primary care provider assessment (oral health evaluation with indications for referral urgency). (AthenaOne, New River Health Association, Scarbro, WV)

## Integrating Oral Health Evaluation into the Prenatal Care Workflow

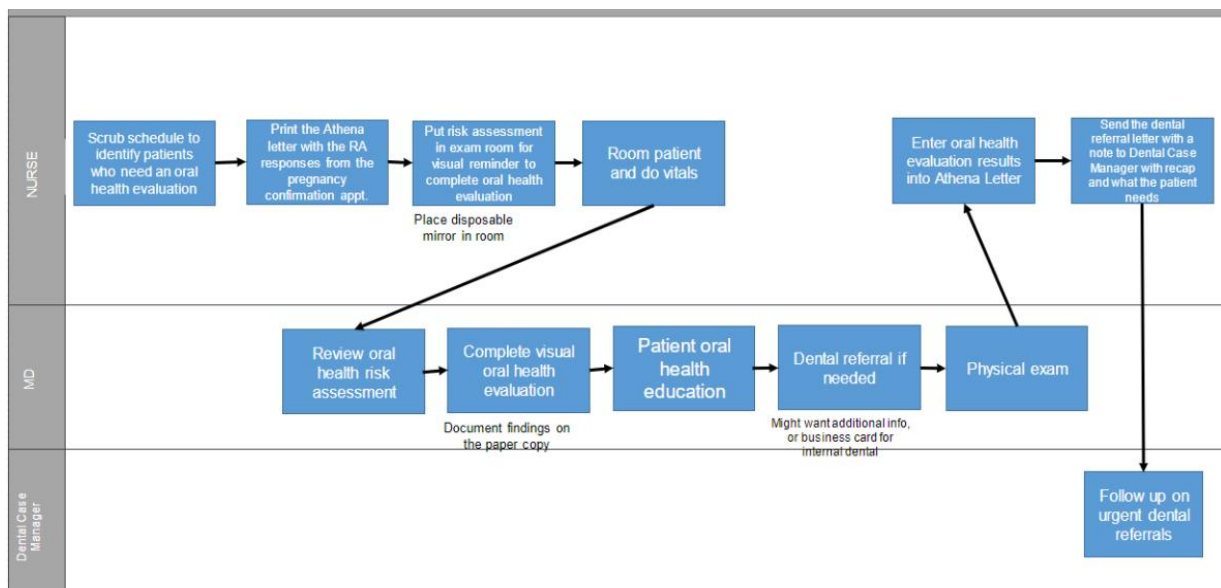
During the initial prenatal intake appointment, when the prenatal provider performs the initial physical examination, may be the best time to conduct the oral health evaluation. The oral health risk assessment and the oral health evaluation results can be used to identify the need for a dental referral. Completing the oral health evaluation early in the patient’s pregnancy allows the most time for oral health care to be completed, if needed.

All Integration LC prenatal clinics are integrating the oral health evaluation during the initial prenatal intake appointment.

“I do mine with the prenatal intake, which is something that’s made it really manageable. I’m literally checking their thyroid and cervical lymph nodes and so it [their mouth] is just right there. I look in the mouth and do my oral exam.”

Christina Drostin, M.D.  
Choptank Community Health, Integration LC clinic

## Sample Workflow for Initial Prenatal Intake Appointment



## Strategies to Increase Primary Care Provider Confidence in Completing an Oral Health Evaluation

### *Interprofessional Training*

Dental providers and team members are the ideal trainers for the prenatal care team. Staff meetings are good opportunities to utilize dental providers and team members to provide hands-on training and answer questions that arise, help prenatal providers and team members learn what to look for, and reinforce dental referral processes.

### *Oral Health Evaluation Guide*

An oral health evaluation guide is a tool for prenatal providers to see photos of common oral health conditions, along with short descriptions. The guide can be used as a part of interprofessional training. It can be laminated and placed in exam rooms, displayed in staff break rooms, and posted to internal shared document sites.

#### **Oral Health Evaluation Guides**

- [Oral Health Screening Guide](#), Albany Area Primary Care, Albany, GA
- [Prenatal Oral Health Screening Guide](#), American Academy of Pediatrics and American College of Obstetricians and Gynecologists

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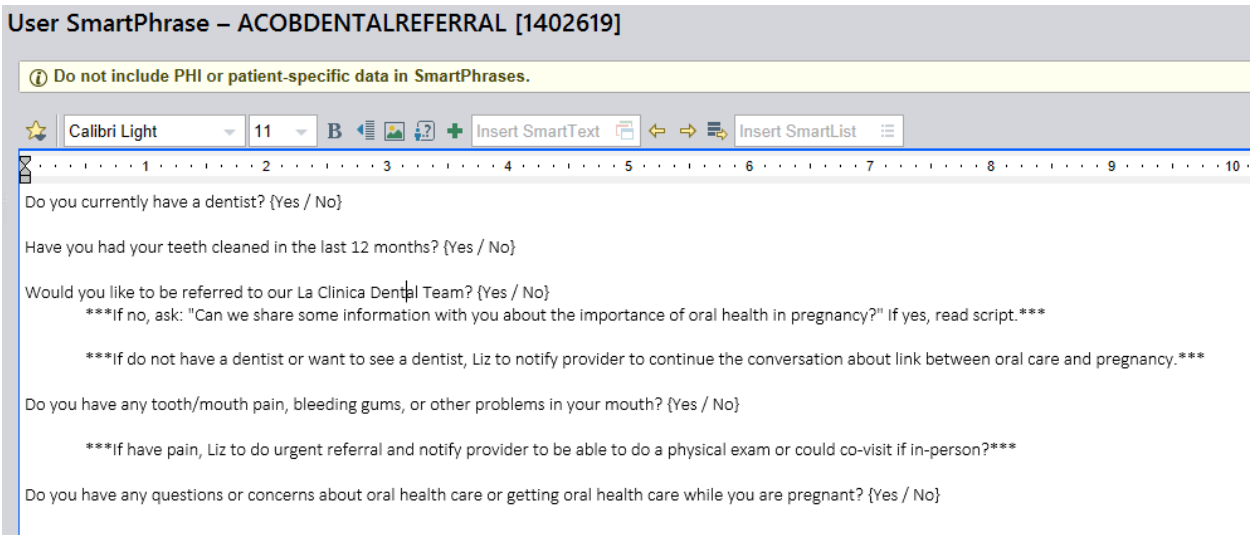
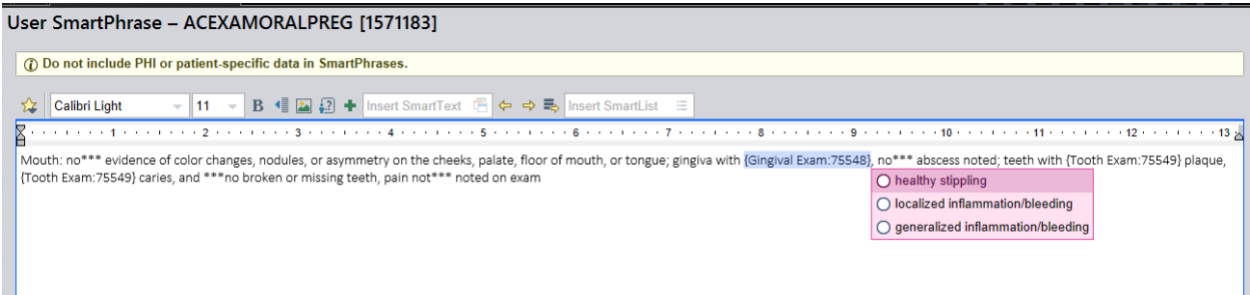
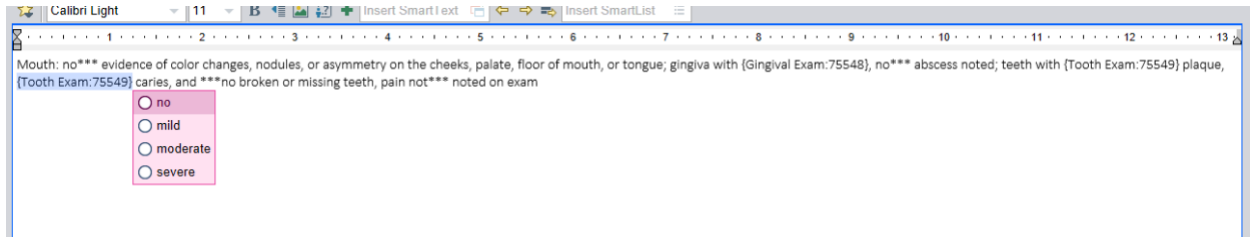
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# Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

## La Clinica de la Raza, Concord, California

The prenatal provider uses dot phrases to document oral health evaluation findings in the patient note. Tracking is done through Tableau, which is a lay-over on Epic and extracts data in certain fields.



## Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

### Albany Area Primary Health Care, Albany, Georgia

The prenatal provider conducts the oral health evaluation guided by the clinical findings and services items below. The prenatal flow sheet within eClinicalWorks was modified to allow the physical exam page to show “Oral Exam Completed” [oral health evaluation] and a drop-down menu with yes/no choices. This field is trackable for reporting.

Clinical Findings	Yes	No
Obvious decay/broken teeth		
White spot lesions		
Inflamed/bleeding gums		
Visible plaque/calculus (tartar)		

Services	Yes	No
Oral health education		
Fluoride varnish		
Follow-up about whether woman has seen a dentist (if woman was given a dental referral at intake visit)		
Dental referral (if woman has not gotten a dental referral)		

#### Initial Physical Examination

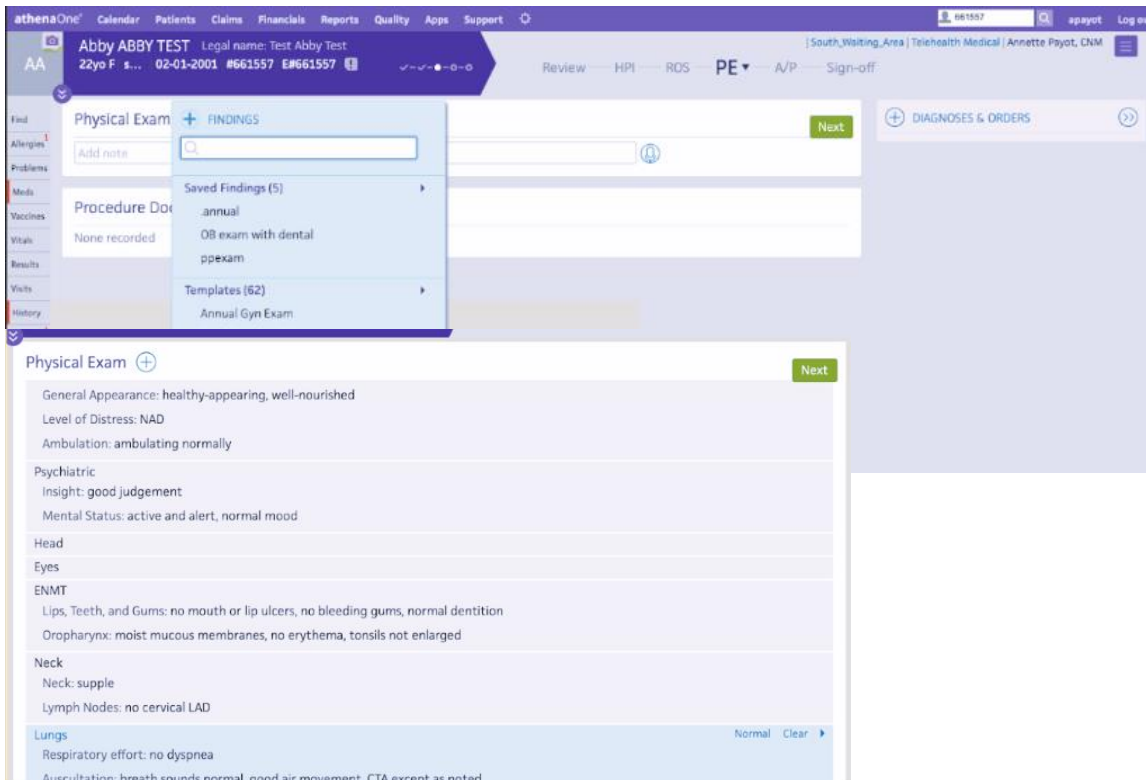
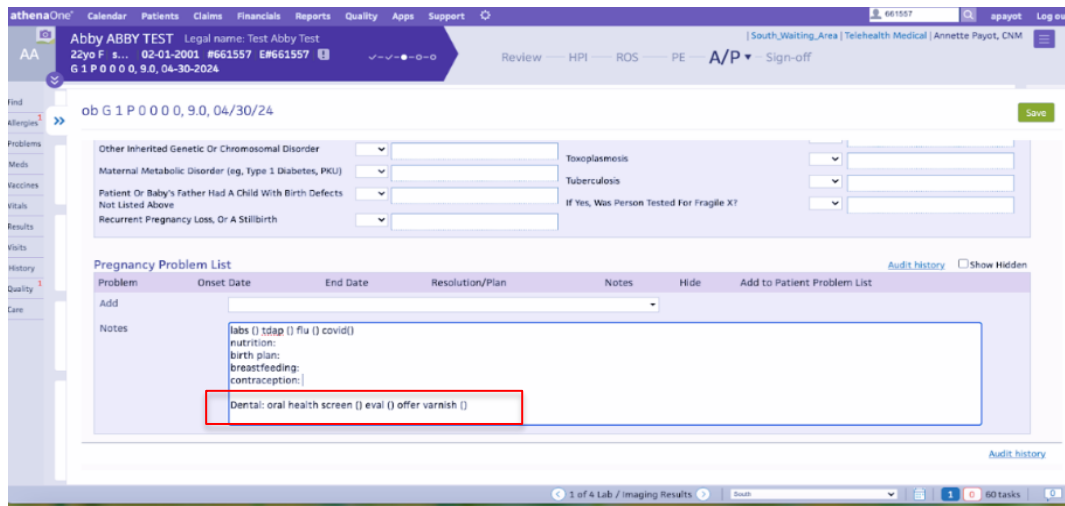
Name	Value	Remarks	Name
Date	mm/dd/yyyy		Height
BP	120/80		Weight
Pre-OB weight			General
Psychiatric	Mood/Affect appr		HEENT
Fundl	Normal		Teeth
Thyroid			Breasts
Respiratory			Cardiovascular
Abdomen	Not examined		Extremities
Skin			Lymph Nodes
External genitalia			Vagina
Uterus Size			Adnexa
Rectum			Diagonal Conjugate
Diagonal Conjugate (cm)			Spines
Sacrum			Pubic arch
Gynecoid pelvic type			Trimester of first visit if NOT with grantee
Oral Exam Completed			

Yes
No

# Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

## PCC Community Wellness Center, Chicago, Illinois

The prenatal provider documents the findings from the oral health evaluation in the dental portion of the physical exam template in Athena. A dental section was added to the notes section of the pregnancy problem list section in the OB Episode. Providers check when each domain has been completed to make it easily accessible for manual chart review.



## **Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record**

### **Choptank Community Health System, Cambridge, Maryland**

The oral health evaluation is printed and placed in the exam room with the patient. The prenatal provider documents findings from the oral health evaluation conducted during the physical exam. A member of the prenatal care team scans the document into the Athena EMR.

### **Clinical Findings**

1. Cavitated or white spot lesions  
\_\_ yes 1- 2 teeth  
\_\_ yes 3+ teeth  
\_\_ no  
description:
2. Inflamed/bleeding gums  
\_\_ yes  
\_\_ no  
description:
3. Visible dental plaque  
\_\_ yes  
\_\_ no  
description:
4. Erosion (from morning sickness)  
\_\_ yes  
\_\_ no  
description:
5. Other lesions or problems noted  
description:



# Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

## G.A. Carmichael Family Health Center, Canton, Mississippi

The prenatal provider completes the printed oral health risk assessment which includes a dental urgency score listed at the bottom of the page. If the dental urgency score is listed, this indicates that the oral health risk assessment was completed.



**Prenatal Risk Assessment Questionnaire**

Y or N	Do you currently have a dentist? If so, please list dentist: _____
Y or N	Have you had a dental exam and cleaning within the past 12 months? If so, when: _____
Y or N	Do you have swollen or bleeding gums, a toothache (pain), problems eating or chewing food, or other problems in your mouth?
Y or N	Do you have sugary foods and drinks between meals? (including juice, soda, and energy drinks)
Y or N	Do you brush your teeth with fluoridated toothpaste?
Y or N	Do you drink water from the tap/faucet?
Y or N	Since becoming pregnant, have you been vomiting? If so, how often: _____
Y or N	Have you received prenatal care? If not, do you need help making an appointment for prenatal care?

Please list any questions or concerns about getting oral healthcare while you're pregnant.  
\_\_\_\_\_  
\_\_\_\_\_

#'s of Yes: _____	<b>***GA CARMICHAEL STAFF ONLY***</b>	Please circle regarding patient:
#'s of No: _____	<small>Dental Urgency - Please circle: 1 = Routine dental checkup (exam and cleaning) 2 = Some dental treatment is needed (cavities/etc) 3 = Pain, swelling, infection (appt ASAP)</small>	<ul style="list-style-type: none"> <li>• Trimester 1</li> <li>• Trimester 2</li> <li>• Trimester 3</li> </ul>
Dental referral given? Yes or No		
Medical/Dental Signature: _____		

#'s of Yes: _____	<b>***GA CARMICHAEL STAFF ONLY***</b>	Please circle regarding patient:
#'s of No: _____	Dental Urgency - Please circle: 1 = Routine dental checkup (exam and cleaning) 2 = Some dental treatment is needed (cavities/etc) 3 = Pain, swelling, infection (appt ASAP)	<ul style="list-style-type: none"> <li>• Trimester 1</li> <li>• Trimester 2</li> <li>• Trimester 3</li> </ul>
Dental referral given? Yes or No		
Medical/Dental Signature: _____		

## Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

### Lorain County Health and Dentistry, Lorain, Ohio

The prenatal provider completes the oral health evaluation and documents findings in the dental care tab portion of the OB template within NextGen. The documentation prompts the billing “dummy” code DOBG for tracking.

The screenshot shows the 'Dental Care' SOAP note form in the NextGen EHR. The form is titled 'Dental Care' and includes the following fields and options:

- No Concerns
- Last Visit: 05/11/2022
- Concerns: Bleeding gums
- Caries:  No  Yes
- Erosion:  No  Yes
- Disease:  No  Yes
- Topical fluoride applied:  No  Yes
- By whom: Judy Cilona, RN
- Date received: 12/14/2022

Buttons for 'OK' and 'Cancel' are visible at the bottom of the form.

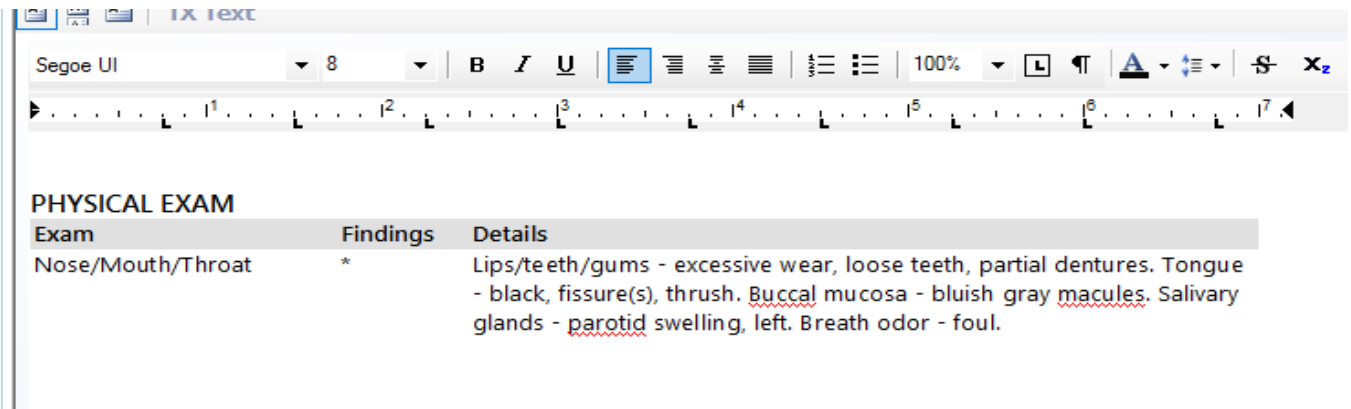
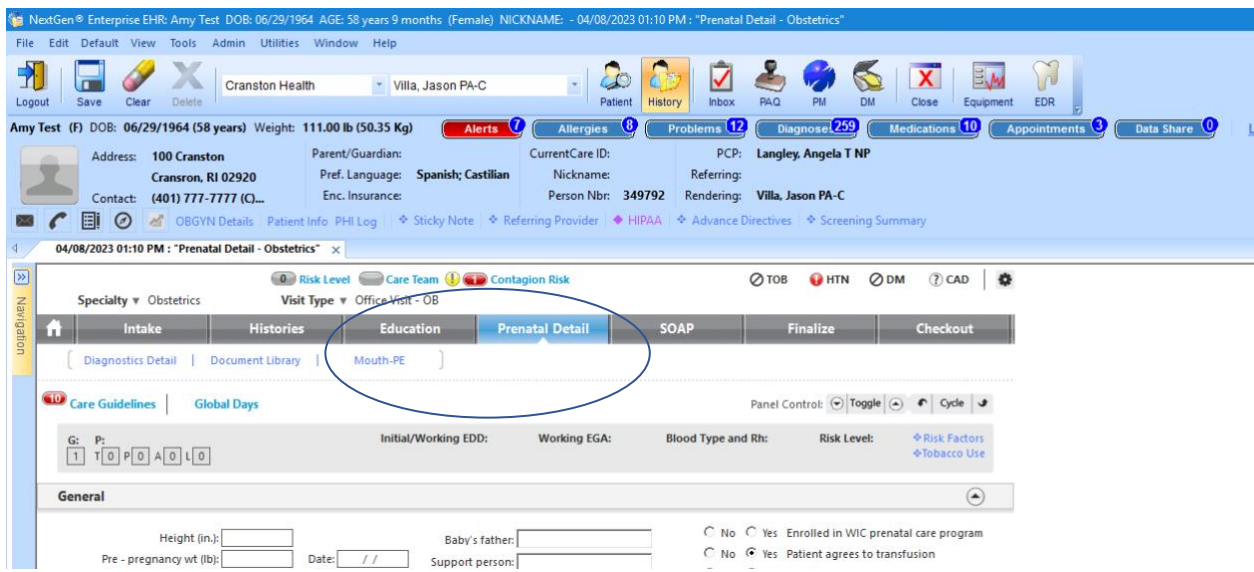
This documentation automatically prompts the billing codes below: (DOBG is a dummy code we created for tracking)

Date	Code	Description	Units	Dx1	Dx2
12/14/2022	99188	APP TOPICAL FLUORIDE VARNISH	1.00		
12/14/2022	DOBG...	Oral Health Assessment OB	1.00		
04/11/2021	81002	URINALYSIS NONAUTO W/O SCOPE	1.00	Z01.419	

# Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

## Comprehensive Community Action Program, Cranston, Rhode Island

The Mouth-Physical Exam template in NextGen was moved from the physical exam field to the prenatal detail to make it convenient for the prenatal provider to use. The prenatal provider documents the findings from the oral health evaluation. If the condition is normal, the provider checks the box; if the condition is not normal, the provider can enter comments or make a selection from the drop-down list.



## Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

### Community Health Network, Houston, Texas


The prenatal provider completes the oral health evaluation and documents the findings in the physical exam portion of the patient record in OpenEMR. Each prompt has a yes/no answer option.

Clinical Findings	
Questionnaire	
1:	<input type="text" value="-- select --"/> Healthy teeth?
2:	<input type="text" value="-- select --"/> White spots or visible decalcifications in the past 12 months?
3:	<input type="text" value="-- select --"/> Obvious decay?
4:	<input type="text" value="-- select --"/> Restorations (fillings) present?
5:	<input type="text" value="-- select --"/> Visible plaque accumulation?
6:	<input type="text" value="-- select --"/> Gingivitis (swollen/bleeding gums)?
7:	<input type="text" value="-- select --"/> Dental pain?
8:	<input type="text" value="-- select --"/> Broken teeth?
9:	<input type="text" value="-- select --"/> Facial swelling?
10:	<input type="text" value="-- select --"/> Drooling?
11:	<input type="text" value="-- select --"/> Fever?

# Appendix 1. Examples of Integrating the Oral Health Evaluation into the Electronic Medical Record

## New River Health Association, Scarbro, West Virginia

The prenatal provider completes the printed oral health risk assessment and oral health evaluation with indications for referral urgency (e.g., dental pain, abscess, swelling, fever). The findings and referral are documented in the oral health tab of Athena.



Patient: \_\_\_\_\_

DOB: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Insurance: \_\_\_\_\_

Estimated Date of Delivery: \_\_\_/\_\_\_/\_\_\_    Trimester at Intake: 1<sup>st</sup> 2<sup>nd</sup> 3<sup>rd</sup>    Gestation at Intake: \_\_\_\_\_ weeks

**Section A: Prenatal Oral Health Screening / Medical Provider Assessment**

Dental Home: \_\_\_\_\_    Last dental visit: < 6 months \_\_\_ year(s)    never

Select fluoride exposure source: drinking tap water    toothpaste    professional applications    supplements

How often do you brush? \_\_\_\_\_    Floss? \_\_\_\_\_    Current Smoker?    Yes    No

Let #/type of high sugar drinks per day? \_\_\_\_\_    Snacks between meals?    Yes    No

Circle all that apply:    Other concern: \_\_\_\_\_

low drinking or spoking chlorine bad breath	periodontal (gum) disease loose, broken, delayed teeth	sores/lesions/ulcers in mouth bleeding gums	sensitivity upon biting grinding teeth dry mouth
--	---	--	--

Guidance Provided:     Oral Health/Prenatal Education     Nutritional Counseling     Tobacco Cessation Counseling

Known Patient Allergies and Precautions: \_\_\_\_\_

Current Medications: \_\_\_\_\_

- URGENT REFERRAL due to dental pain, abscess, swelling, fever
- Medication Prescribed Today \_\_\_\_\_
- Dental Cleaning with \_\_\_\_\_ weeks

NRHA OB Provider:     Whitney Boggs, M.D.     Erica Stanley, APRN, FNP-BC     Brittney Mengel, FNP-C

Signature: \_\_\_\_\_    Signature /Assessment Date: \_\_\_\_\_

Referred To: \_\_\_\_\_    Phone: \_\_\_\_\_    Fax: \_\_\_\_\_

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**Section B: Dental Provider Assessment**    Date of Exam: \_\_\_\_\_

Diagnosis/Treatment Plan: \_\_\_\_\_     Dental Cleaning     Fluoride Varnish

Next App: \_\_\_\_\_

Dental Pt: \_\_\_\_\_

Signature: \_\_\_\_\_

**Guidance Provided:**     Oral Health/Prenatal Education     Nutritional Counseling     Tobacco Cessation Counseling

**Known Patient Allergies and Precautions:** \_\_\_\_\_

**Current Medications:** \_\_\_\_\_

- URGENT REFERRAL due to dental pain, abscess, swelling, fever
- Medication Prescribed Today \_\_\_\_\_
- Dental Cleaning with \_\_\_\_\_ weeks

NRHA OB Provider:     Whitney Boggs, M.D.     Erica Stanley, APRN, FNP-BC     Brittney Mengel, FNP-C

Signature: \_\_\_\_\_    Signature /Assessment Date: \_\_\_\_\_

Referred To: \_\_\_\_\_    Phone: \_\_\_\_\_    Fax: \_\_\_\_\_