DentalXpand

Provider check-in worksheet

Five fields for an owned action and a reply to the provider.

Version 1 | 9 October 2026 | Fillable companion to the HTML guide

1. Concern and source

Provider's words or faithful summary; named response reference or permitted practice context. Keep the provider's account separate from staff interpretation.

2. Owner and authority

Eligible action owner; person authorized to approve the change; alternate reviewer if the concern involves the usual manager.

3. Agreed action

What the team and provider agreed; evidence needed; pending decision.

4. Review and next update

Review date; next update promised to the provider; escalation contact if delayed.

5. Provider response and outcome

Provider's reply; pending work, administrative closure or provider-confirmed resolution; closure basis and next check-in.

Use and privacy

Use only your team's approved workspace and authorized case/practice scope. Raw-survey review, case handling and internal-note access are separate permissions. Confirm the actual accounts before collecting feedback. A job title or invitation link does not grant all three.

Named responses retain a provider link; unnamed responses retain practice context. Delivery and participation records are separate and do not prove authorship. Comments or small groups may identify someone. Do not promise complete anonymity.

Use a permitted record reference where possible. Do not enter patient information, passwords, Social Security numbers or other credentials. Do not place sensitive details in a broadly shared copy.

Keep entries brief and check saved/printed text in your PDF viewer. This operational worksheet does not replace clinical or professional guidance. The dated full guides remain separate.